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January 1993

Dairy, Livestock and Poultry

World Poultry Situation

TRENDS IN INTERNATIONAL POULTRY MARKETS

Production

--World total poultry meat production is forecast to increase about 4 percent in 1993.
--The United States continues to be the world's leading poultry meat producer.
--Mexico's poultry industry is expanding at a rapid rate.
--Production in Japan continues to fall as producer costs continue to increase.
--Brazil's broiler industry is operating at almost full capacity.
--France's broiler output topped 1 billion tons in 1992.
--Thailand's broiler sector is harmed by both diseases and drought during 1992.

Trade

--U.S. poultry meat exports are at record levels.
--U.S. broiler meat exports continue to expand into new markets.
--Hong Kong surpasses Japan to become the United States' number one customer for broiler meat in 1992.
--Japan's broiler imports slow down due to a downturn in the economy.
--Thailand's broiler exports falter as demand slackens in Japan.
--Brazil's broiler shipments continue to grow.
--China is playing a greater role in Asia's broiler market.
--France is looking to expand market share within the European Community.
--Mexico's broiler and turkey imports continue to climb.

Approved by the World Agricultural Board - USDA

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Information featured in this publication is based on reports from FAS overseas posts. This publication would not be possible without the contributions of Agricultural Counselors, Attaches, and Trade Officers and their foreign Agricultural Specialists and staff based in each country.

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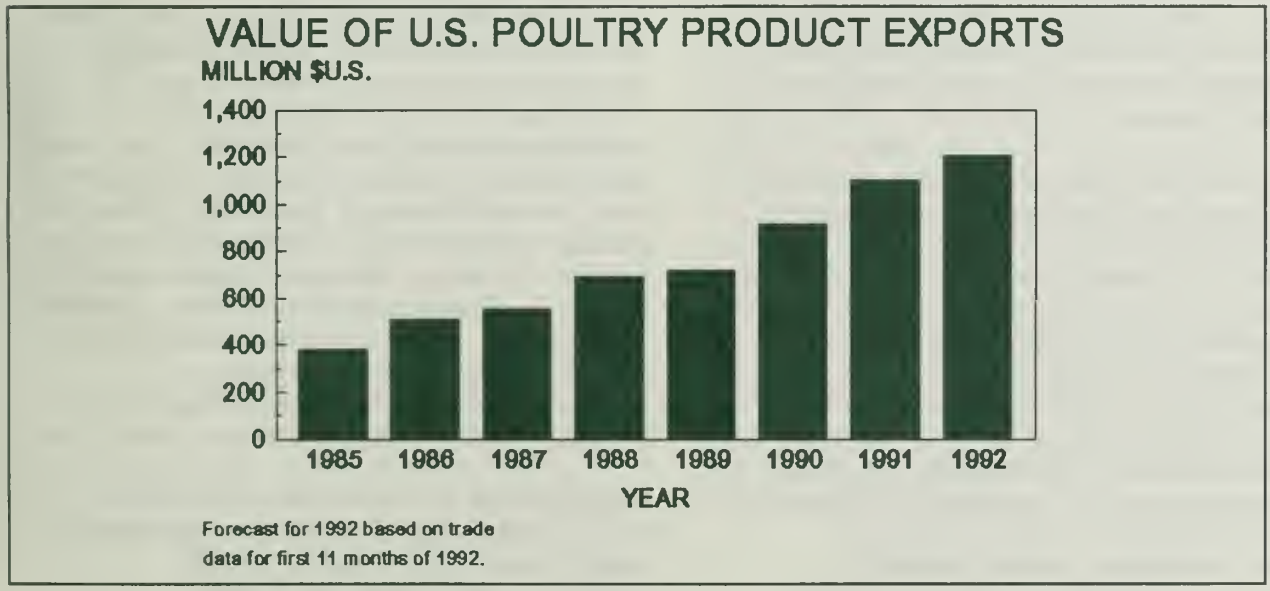
INTRODUCTION TO SEMI-ANNUAL UPDATE OF POULTRY PRODUCT PRODUCTION, DISTRIBUTION, AND TRADE

This publication presents revised data concerning the world's supply and utilization of poultry products and discusses trends and key developments in selected countries. Data for the following 12 countries are updated in this semi-annual edition: Brazil, Canada, Egypt, France, Hong Kong, Japan, Mexico, the Netherlands, Saudi Arabia, Singapore, the region of the former Soviet Union, and the United States. The narrative and data presented here are intended to augment and compliment the information contained in the World Poultry Situation annual edition published in August, 1992. The data for 1992 are still tentative as complete information for the entire calendar year was not yet available at the time of publication. In most cases, the 1992 estimates are based on data covering the first 9 months of the year.

The content of this publication is organized as follows: first, the growth of U.S. exports of poultry products during 1992 is described; next comes a discussion of developments during 1992 in the world's largest broiler meat importing countries; specifically, Hong Kong and Japan; this is followed by a discussion of current trends in some of the world's major broiler meat exporting countries, namely, Thailand, Brazil, and the European Community (EC); and finally patterns and developments in Mexico's rapidly growing poultry industry are detailed. Production, consumption, and trade tables conclude the report.

U.S. POULTRY PRODUCT EXPORTS AT RECORD LEVELS

Following an unprecedented $1.1 billion of poultry product exports in 1991, the United States is forecast to achieve another record in 1992. The total value of U.S. poultry meat, egg and egg products, and live poultry exports is estimated to have been around $1.2 billion last year. Exports of almost all categories of poultry meat were up, with broiler and turkey part exports enjoying the largest increases. U.S. exports of broiler parts continued to make up the lion's share of poultry meat exports in 1992. U.S. exports of dark meat parts, which do not benefit from any form of export subsidization, continued to be about the cheapest source of meat protein on the world market, and U.S. broiler part exports expanded into a number of new markets. U.S. turkey exports, which have been booming in recent years, continued to grow in 1992, expanding by an estimated 60 percent. Another promising development for the U.S. poultry sector in 1992 was exports of prepared poultry meals, which almost



doubled in terms of both value and quantity. In addition, the value of table egg exports was up an estimated 4 percent, while exports of live poultry increased about 9 percent. Exports of whole broilers, the only U.S. poultry meat product for which the United States does offer export subsidies, declined in 1992.

Broiler exports were still the leading category of U.S. poultry exports, accounting for about 50 percent of the value of total poultry product exports during 1992. Led by growth in sales to Hong Kong, Mexico, Romania, and Poland, U.S. broiler meat exports grew to around 658,000 metric tons, about 15 percent above the previous year. Measured by quantity imported, Hong Kong surpassed Japan to become the largest importer of U.S. broiler products in 1992. Broiler export volume to Hong Kong is estimated to have increased 43 percent. Hong Kong's growing domestic demand for broiler parts, and its flourishing trade with southern China were the main factors driving the growth in U.S. broiler exports to Hong Kong. The quantity of U.S. broiler exports to Japan was adversely effected by the slowdown in Japan's economy, and U.S. export volume probably declined about 3 percent. Nonetheless, Japan remained the number one U.S. broiler meat customer in terms of value, purchasing an estimated $130 million worth of U.S. broiler products. Other than Japan, the U.S. experienced gains in export volume to most other Pacific Rim countries, with U.S. broiler meat exports to this region accounting for about 45 percent of the total quantity exported.

After the Pacific Rim, the next most important broiler meat markets for the United States were neighboring Mexico and Canada. U.S. exports to its southern neighbor have risen sharply in recent years, and shipments were up again in 1992. Mexico is estimated to have purchased about 72,000 tons last year, making this the United States' third leading export market. Mexico's growing per capita income, combined with attractive prices of U.S. broiler parts and mechanically deboned meat, is propelling the expansion of U.S. exports southward. Despite Canada's restrictive import quota system, U.S. exports to its northern neighbor are estimated to have climbed about 23 percent. In 1992, Canada was the fourth largest importer of U.S. broiler meat by volume.

The growth of U.S. broiler exports to its traditional markets in the Pacific Rim and North America in 1992 was matched by success in expanding exports into new markets. After having not exported to Romania for a number of years, the United States exported an estimated 23,000 tons to that country in 1992. In addition, the United States exported about 36,000 tons of broiler meat to Poland; a country to which U.S. exports had been almost nil in recent years. The majority of the U.S. broiler meat exported to these two Central European countries was leg-quarters, which are proving to be highly popular and relatively inexpensive for consumers living under the austere economic conditions prevailing in these two countries. Broiler exports to Iran, another new market the United States entered in 1992, were estimated to have been around 10,000 tons. During 1992, other destinations where U.S. broiler meat exports experienced significant growth in demand include South Africa, Guatemala, Colombia, Venezuela, and Guyana.

Coincident with the success of U.S. broiler exports in 1992, a number of governments took steps to disrupt the flow of U.S. broiler meat entering their countries. Bowing to local producers' pressure, a long list of countries either increased tariffs or created new sanitary regulations to counter U.S. broiler imports. From South Africa, to Central America, to South Korea, the popularity of competitively priced U.S. broiler meat generated demands from local producers to block U.S. broiler imports. A number of countries justified the new trade barriers by alleging that the U.S. was "dumping" leg quarters into their domestic markets. Other countries, meanwhile, wrongly accused the U.S. of providing subsidies for its broiler parts exports.

Ironically, U.S. exports of whole broilers, the only U.S. poultry meat commodity that does benefit from export subsidies, actually declined in 1992. Under the Export

Top 5 destinations for U.S. broiler meat, 1988-1992. (1000 MT)									
1988		1989		1990		1991		1992	
JAPAN	15	JAPAN	101	FSU	136	JAPAN	125	HONG KONG	148
HONG KONG	46	HONG KONG	75	JAPAN	93	HONG KONG	105	JAPAN	121
MEXICO	45	MEXICO	41	HONG KONG	81	FSU	83	MEXICO	72
JAMAICA	27	CANADA	30	MEXICO	39	MEXICO	60	CANADA	41
SINGAPORE	25	SINGAPORE	26	CANADA	35	CANADA	34	POLAND	36

Enhancement Program (EEP), U.S. exporters of whole broilers receive bonuses to compete with highly subsidized EC whole broiler exports in the Gulf States, Saudi Arabia, Jordan, Egypt, and Singapore. In 1992, the U.S. exported only about 12,000 tons of whole broilers under the EEP, compared to 19,105 tons exported under the EEP in 1991. These subsidized exports comprised less than 2 percent of total U.S. broiler exports in 1992. Moreover, U.S. whole broiler exports to Canada and Mexico, two markets not targeted by the EEP, accounted for an estimated 42 percent of U.S. whole broiler exports in 1992. Clearly, the success of U.S. broiler meat exports in 1992 was not due to the EEP, but rather due to the competitiveness of U.S. broiler parts on the world market.

The record-breaking U.S. broiler exports in 1992 occurred despite the fact that trade with countries of the former Soviet Union (FSU) was minimal compared to previous years. The FSU was the number three market for U.S. broiler meat in 1991, importing 83,000 metric tons. In 1992, however, the Republics of the FSU are estimated to have imported only about 13,000 tons. Economic and institutional adjustments in the Republics, combined with shortages of foreign exchange, continue to hamper the flow of poultry meat into the region.

Like broiler meat exports, U.S. exports of turkey meat increased dramatically during 1992. After having almost doubled in 1991, U.S. exports are estimated to have increased 60 percent last year, to about 75,000 tons. During 1992, top markets for U.S. turkey meat were Mexico, the United Kingdom, and South Korea. Mexico imported an estimated 42,000 tons, or about 55 percent of the total quantity exported. Exports to South Korea are estimated to have been near 8,000 tons, which is about triple the quantity exported to that country in 1991. Of the total quantity of turkey meat exported in 1992, about 90 percent consisted of turkey parts. In South Korea, turkey parts are used in further-processed meat products, and Mexican consumers use the relatively inexpensive turkey parts in lieu of red meat cuts.

In 1992, U.S. table egg exports increased around 10 percent to about 57 million dozen. Unlike U.S. poultry meat exports, U.S. table egg exports are greatly aided by the EEP. In 1991, about 18.8 million dozen table eggs were exported under the EEP. This quantity grew in 1992, when 38.2 million dozen were exported under the Program, which was about two thirds of total U.S. table egg exports. U.S. table egg shipments to Hong Kong, a targeted EEP market, accounted for about 50 percent of total table egg exports. The other two most important markets for U.S. table eggs were Canada and Mexico, importing around 13.5 and 5.7 million dozen, respectively. When considering the aggregate of table eggs, hatching eggs, and egg products on an egg equivalent basis, U.S. egg exports increased about 1 percent in 1992. Due to a slump in hatching egg sales, however, the total value of U.S. egg and egg product exports is estimated to have declined about 3 percent.

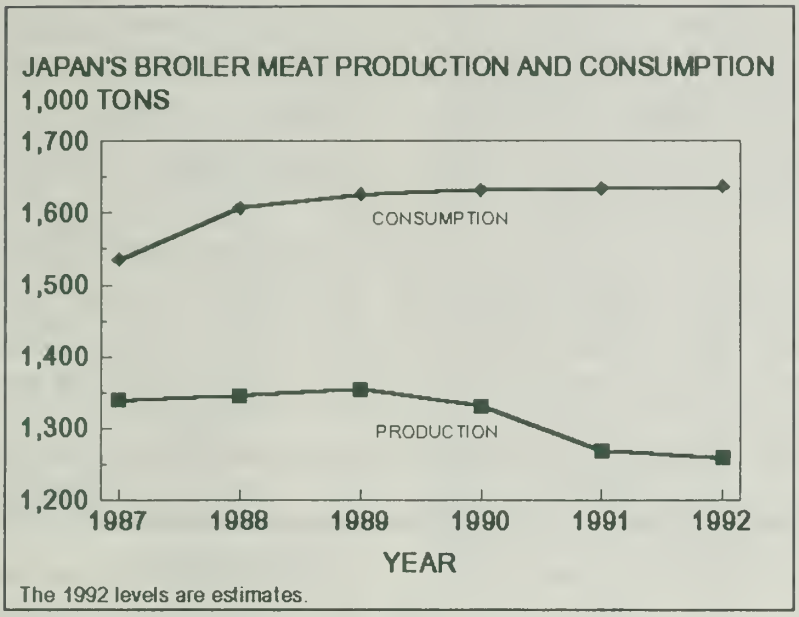
The outlook for 1993 U.S. poultry product exports is promising. Competitively-priced U.S. broiler cuts are expected to continue expanding in the world market, and broiler exports are forecast to increase about 3 percent in 1993. The Pacific Rim and Mexico are expected to again be important growth markets. Also, broiler exports to Russia could rebound if U.S.D.A. credit guarantees are reactivated. Continued growth in turkey meat exports to Mexico should boost U.S. turkey exports about 5 percent in 1993. The continuing diversification of U.S. further-processed and specialty poultry product items should further contribute to the growing value of U.S. poultry meat exports. Egg exports are forecast to increase about 1 percent in 1993. U.S. table egg exports will continue to be largely dependent on the availability and attractiveness of EEP bonuses. U.S. egg product exports will be heavily influenced by developments in Japan's market, the destination for about 50 percent of U.S. egg product exports.

JAPAN'S FALTERING ECONOMY RESULTS IN GROWING BROILER MEAT STOCKS

The contraction of Japan's poultry producing sector, which began in the early 1980's, continued during 1992. Total poultry meat production in Japan has declined about 12 percent in the last five years due to steadily rising costs of production. In early 1992, a new poultry inspection system was introduced, further eroding the competitiveness of Japan's poultry producing sector. According to the Japan Broiler Association, the new regulations increased the cost per bird by $0.24. As a result, more poultry producers are expected to halt operations in the future, prolonging the downward trend in poultry production. For 1992, Japan's total poultry meat production was around 1.4 million tons, a drop of about 5 percent from the quantity produced in 1991.

Even though production of poultry meat in Japan is declining, poultry meat consumption continues to grow. Since 1987, poultry meat consumption has increased at an annual rate of about 1 percent. In 1992, however, the growth in poultry meat consumption is estimated to have slowed somewhat because of the sluggishness of Japan's economy. Faltering demand led to a decline in poultry meat prices and an increase in stocks. With domestic demand relatively weak, a surge in poultry meat imports during the last quarter of 1991 helped push Japan's poultry meat stocks to record levels in 1992. By year's end, broiler meat stocks were around 85,000 tons, an increase of about 42 percent from the level held at the end of 1991.

As stocks grew over the the course of year, poultry meat prices dropped accordingly. Compared to price changes for other poultry cuts, breast meat prices exhibited the most marked decline in 1992. Boneless breast prices dropped about 20 percent, while



prices for boneless leg cuts dropped about 8 percent during the first nine months of the year.

In addition to the sluggish demand, a surge in imports from China contributed to the buildup of breast meat stocks and the drop in breast meat prices. Shipments from China contained full sets of parts with breast portions attached. The dark meat cuts were removed from the complete sets and sold separately. The demand for dark meat in Japan is greater than the demand for breast meat; thus, the dark meat portions of the shipments from China were more easily marketed. The remaining breast meat cuts were not sold as quickly, causing the buildup in breast meat stocks and the resulting collapse in breast meat prices.

The decline in prices for breast meat only accentuated the difference between light and dark meat prices in Japan's domestic market. In September 1991, the price of boneless leg meat in Japan was 28 percent greater than prices for boneless breast meat. After the large drop in breast meat prices during the first three quarters of 1992, the price gap between breast and dark meat broadened to 47 percent.

Despite Japan's relatively weak economy, broiler imports in 1992 are estimated to have been about 395,000 tons, an increase of around 14 percent over 1991. Apparently, Japanese traders have been willing to continue importing, despite accumulating stocks, in anticipation of rejuvenated demand in 1993. The willingness of Japan's importers to hold stocks at the end of 1992 should translate into reduced imports in the first half of 1993, as stock levels are drawn down. Imports are predicted to rebound only slightly in the second half of 1993, and Japan's 1993 broiler imports are forecast to increase only about 1 percent.

Japan's broiler import sector can be characterized as consisting of two markets; the bone-in-leg market and the processed parts market. The United States has dominated the bone-in-leg market for years with Japan usually importing about 85 percent of its bone-in-leg needs from the United States. Though the United States will still provide about 83 percent of the market, U.S. exports of bone-in-leg cuts are estimated to have dropped about 11 percent in 1992. Thailand and Brazil, the only other major exporters of bone-in-leg meat to Japan, are also estimated to have experienced reductions in bone-in-leg exports to Japan in 1992. Overall, Japan's total bone-in-leg imports for 1992 are expected to be around 93,000 tons, about 9 percent less than the previous year.

Japan's imports of processed parts, on the

JAPAN'S BROILER MEAT IMPORTS BY SOURCE AND TYPE, 1988-1992.					
	1988	1989	1990	1991	1992
PROCESSED PARTS	(1,000 TONS)				
THAILAND	71.8	81.1	97.9	120.9	138.7
UNITED STATES	31.1	39.0	31.5	31.7	38.1
BRAZIL	24.9	31.1	31.2	40.3	50.2
CHINA	20.5	25.5	34.6	31.8	57.9
OTHERS	6.1	9.4	9.8	15.5	13.1
ANNUAL TOTAL	154.4	186.1	205.0	240.2	298.0
BONE-IN-LEG	(1,000 TONS)				
UNITED STATES	86.7	64.8	68.3	85.3	75.8
THAILAND	9.1	7.9	6.8	7.9	7.3
BRAZIL	7.5	7.1	7.5	8.3	8.0
CHINA	0.5	0.1	0.1	0.2	0.5
OTHER	0.2	0.2	0.1	0.3	0.6
ANNUAL TOTAL	104.0	81.3	82.8	102.0	92.2

other hand, are estimated to be about 300,000 tons, about 25 percent greater than in 1991. Processed parts generally account for about two-thirds of Japan's total broiler meat imports, but with the slow-down in bone-in-leg imports, processed parts will likely account for about 75 percent of Japan's broiler meat imports in 1992.

Based on overall trade estimates for 1992, Thailand will again be the dominant supplier of broiler parts to Japan. Since 1987, Thailand has supplied about half of Japan's parts imports, with the rest coming primarily from Brazil and the United States. By tapping into Japan's thriving market for processed broiler meat, Thailand succeeded in becoming the number one supplier to Japan during the latter part of the 1980's. Thailand is expected to have maintained its position as the number one supplier of broiler meat to Japan in 1992, accounting for about 47 percent of parts imports and 37 percent of overall imports. However, the growth in Thailand's exports to Japan is estimated to have been less than earlier forecast due to the downturn in Japan's economy and due to heightened competition from other exporters. Of all the other exporters vying for market share in Japan, China is closing the gap with Thailand at the most rapid rate.

China's broiler sector is developing rapidly, and China now appears poised to take a much stronger position in Japan's broiler import sector. China's exports of processed cuts are estimated to have increased about 80 percent in 1992. At least six major Japanese poultry processors have invested in poultry operations in China to serve Japan's domestic market. Given China's relatively low-cost labor force, its growing production capacity spawned by foreign investment, and its close proximity to Japan, China's exports of processed poultry parts to Japan are projected to continue growing in the future. Japan's traders indicate that prices for Chinese products are extremely low and that China's exporters have been

willing to sustain some losses in order to establish a secure long-term position in Japan's import sector.

In terms of overall market share, Thailand's is estimated to have remained steady at about 37 percent in 1992. Brazil's share is also estimated to have remained steady. Though the United States showed impressive gains in exporting processed parts to Japan, the decline in bone-in-leg exports to Japan has likely caused U.S. market share to decline from 34 percent in 1991 to about 29 percent in 1992. The loss in U.S. market share was replaced by a gain in China's market share, which has grown from 9 percent in 1991 to 15 percent in 1992.

As alluded to earlier a gap, exists between white and dark meat prices in Japan stemming from the underlying preference for dark meat among Japan's consumers. This preference should ensure that exporters of dark meat will continue to hold a significant share of Japan's poultry market. The United States, where the structure of demand favors the consumption of light meat, is in a good position to capitalize on Japan's continued preference for dark meat. Prices of poultry meat in the United States are essentially the mirror image of those prevailing in Japan; light meat in the United States commands a higher price than dark meat. Thus, the preference for dark meat in Japan's market is ideal for U.S. exporters. However, U.S. exporters will have to make greater efforts to tailor products to meet the unique demands of Japan's market. The pattern of declining bone-in-leg imports but increasing processed part imports that emerged in 1992 signifies the need for U.S. exporters to concentrate more on Japan's processed parts market.

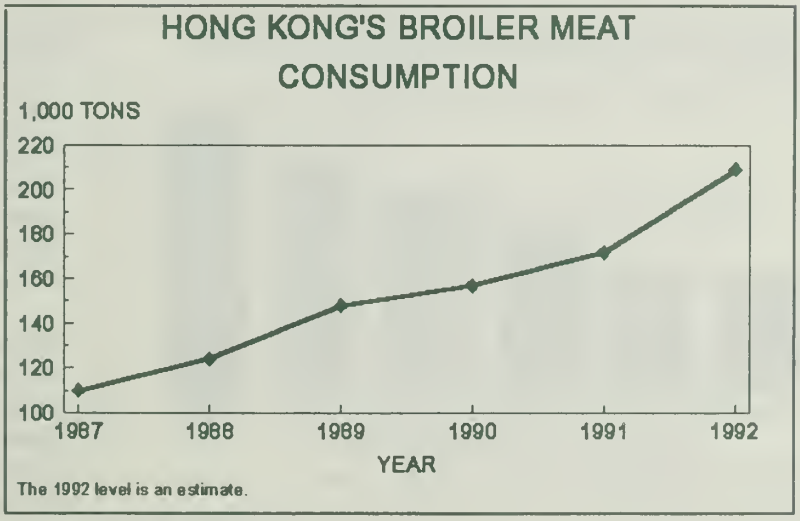
To summarize the developments in Japan's important broiler meat import sector in 1992, the slowdown in the domestic economy caused imports to grow less than earlier forecast, China is becoming a more active player in the market, and the United States is losing some of its bone-in-leg market.

HONG KONG'S IMPORTS CONTINUE TO ESCALATE AT A BRISK RATE

As is occurring in Japan, Hong Kong's poultry meat production is declining, domestic consumption is growing steadily, and the corresponding domestic poultry meat deficit is being replaced by imports.

Recently implemented environmental laws increased already growing poultry meat production costs in Hong Kong. The rising costs, combined with keen competition from imports, have caused Hong Kong's broiler production to drop about 20 percent since 1987. Production is forecast to continue dropping through 1993, and it is expected that Hong Kong's domestic broiler industry will be phased out in the next decade.

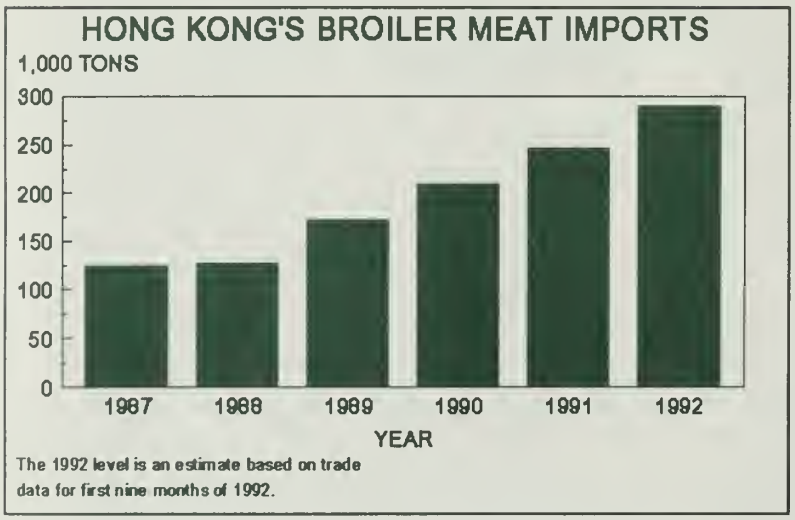
Though Hong Kong's poultry producing sector continues to shrink, domestic consumption of poultry meat has been growing steadily. Hong Kong's growing per capita income, the preference for poultry meat as a protein source, and the availability of a broad array of imported poultry products are the primary factors driving the growth in poultry meat consumption. In the last five years, broiler consumption has increased 38 percent. Consumption is estimated to have increased another 10 percent in 1992, giving Hong Kong a per capita consumption of broiler meat of about 33 kilograms, one of the highest levels of broiler meat consumption in the world.



Broiler meat in Hong Kong is marketed at retail outlets in two forms: as live chickens and as frozen products. About 32 percent of the live chickens marketed in Hong Kong are sourced from local farms while the remainder is imported from southern China. The live chickens are then sold at local markets and consumed in Chinese restaurants or in individual households. The live chicken share of Hong Kong's total broiler meat consumption has been declining in recent years. The proportion of total chicken meat marketed live declined from 37 percent in 1991 to around 30 percent in 1992. Thus, the tremendous growth of broiler consumption in Hong Kong has come in the form of imported parts. The frozen imports have proven to be extremely popular in individual households as well as restaurants and fast food outlets.

The success of frozen imports in Hong Kong's domestic market can be attributed partly to Hong Kong's granting ready access to the world's poultry meat exporters. Hong Kong's relatively unfettered trade system fosters a very competitive environment among poultry traders, providing Hong Kong's consumers with a diverse selection of poultry products at favorable prices. Given Hong Kong's stated policy of maintaining free market access to the world's poultry meat traders, this market should remain a fiercely contested, yet growing market for the world's poultry meat exporters.

Hong Kong's broiler meat imports are estimated to have increased about 17 percent in 1992. Trade estimates show that the United States and Brazil registered gains in market share, while the EC and Thailand experienced losses.



Since 1985, when the United States overtook China to become the largest supplier of broiler meat to Hong Kong, the United States has held an overwhelming share of Hong Kong's broiler meat import market, and the United States continued to be Hong Kong's largest supplier of broiler meat in 1992. In 1992, U.S. broiler exports to Hong Kong are estimated to have increased about 43 percent, accounting for about 60 percent of Hong Kong's total imports. The next largest suppliers after the United States were Brazil and the Netherlands, which supplied about 8 and 7 percent of Hong Kong's total broiler meat imports, respectively.

The success of U.S. products in Hong Kong can be attributed to a price advantage in chicken feet and wing tips, which are very popular in Hong Kong and neighboring China. There is very little demand for chicken feet in the United States, so U.S. exporters are able to offer this commodity to Hong Kong's importers at very attractive prices. Hong Kong's traders indicate that wings from Brazil may have a slight advantage over U.S. wings in terms of product appearance and packaging, but the U.S. products are more price competitive.

Hong Kong's thriving trade with Southern China is another factor contributing to U.S. exporters' expanding sales to Hong Kong. Hong Kong is estimated to have re-exported about 100,000 metric tons of broiler products to Southern China in 1992, much of which was originally imported from the United States. The majority of the products being re-exported are poultry feet and wing tips, and traders indicate this market will continue to expand.

Pricing and product quality will remain the most important factors for exporters competing in Hong Kong's market. Given the number of suppliers with relatively unencumbered access to this market, competition will remain

challenging in the future, but the United States should continue to maintain its dominant position in the market.

THAILAND'S BROILER SECTOR HAMPERED BY DISEASE, DROUGHT, AND SLOW EXPORTS TO JAPAN

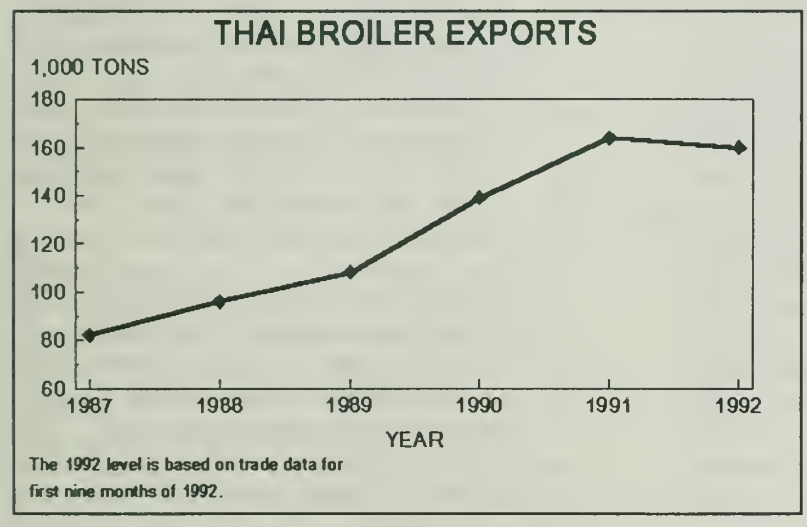
Due to persistent disease problems, an unusually extended dry season, and weak overseas demand, Thailand's broiler production in 1992 is estimated to have grown at a somewhat slower pace than in recent years. In the past five years, Thailand's broiler output has been expanding at a annual rate of about 10 percent. But in 1992, production is estimated to have increased only about 8 percent. An outbreak of infectious bronchitis and a long dry season led to high mortality rates and decreased feed efficiency. In addition, depressed prices for grower chicks caused some producers to scale back production plans. These problems have convinced many producers to cut back production for 1993 as well, and annual output growth is expected to slow to about 6 percent.

Thailand, Asia's largest exporter of broiler meat, is predicted to have experienced a slight reduction in export sales in 1992. If this proves to be true, 1992 will be the first year in over a decade that Thailand has failed to achieve substantial growth in export sales. The unexpected sluggish export demand for Thailand's broiler products can be attributed to fierce competition in Japan's market from China, in combination with the weakness of Japan's economy. As a result of the weakened overseas demand, export prices for Thai broiler meat dropped about 39 percent, compared with 1991 price levels.

Thailand's less than favorable 1992 broiler export quantity and prices points to one of the fundamental weaknesses of Thailand's broiler sector. The major flaw in Thailand's broiler sector is that the overall performance of the sector is largely determined by exports to Japan. A majority of the further-processed poultry meat produced in Thailand is bound for export, and about 85 percent of Thailand's exports go to Japan. Consequently, sluggish sales to Japan can have a severe impact on the overall sector. In 1992, stagnating demand in Japan reduced Thailand's export prices, which led to a 15 percent drop in Thailand's domestic prices. Declining domestic prices reduced the incentive for producers to expand production, and they cut back on the purchase of grower chicks. The drop in demand for grower chicks only exacerbated the over-supply situation in the chick market, and chick producers scaled-down their operations as well.

Cognizant of their reliance on Japan's market, Thai exporters have attempted to seek other market outlets in recent years. Their efforts to expand sales into the EC were thwarted in May of 1992 when the EC began applying an extra duty of about $750 per ton on imported parts, and sales to the EC subsequently dropped. In addition, Thai exports to Singapore and Hong Kong during 1992 are also estimated to have weakened.

Given the difficulties Thailand has had in expanding markets for their broiler products in 1992, the quantity of Thai exports in 1993 will again be dependent on developments in Japan's market. Absent a rebound in demand for poultry meat in Japan, growth in Thailand's broiler meat exports may again be slow in 1993.



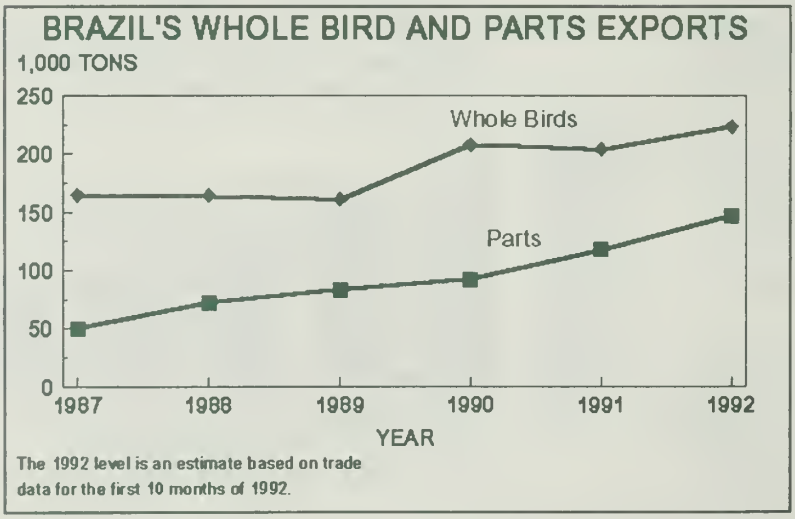
BRAZIL'S BROILER SECTOR CONTINUES TO EXPAND

After a 12 percent increase in 1991, broiler production in Brazil is estimated to have increased about 9 percent in 1992. This represents another record-setting production level for Brazil, and Brazil's broiler sector is currently operating at about 89 percent capacity. In 1992, Brazil's growth in broiler output was fueled by growing domestic and foreign demand. Domestically, relatively high beef prices caused Brazil's consumers to replace beef with chicken, and consumption of broiler meat is estimated to have increased about 8 percent. Now, according to some estimates, per capita consumption of chicken in Brazil is higher than that for beef.

On the export side, Brazilian exports are estimated to have been around 370,000 tons in 1992, an increase of about 15 percent over the previous year. Brazil's growth in exports occurred as a result of a favorable exchange rate, a slight weakening in Brazil's export prices, and strong exports to the Middle-East, Japan, the EC, and to neighboring Argentina. Exports to Argentina, which were essentially zero in 1991, are estimated to have been around 19,000 tons in 1992. According to Brazilian traders, the growth in exports to Argentina stems from the favorable price and quality of Brazil's whole birds compared to that of Argentina's products. In addition, an exchange rate advantageous to Brazil has helped stimulate Brazil's exports to Argentina. Years of recession have severely limited Argentina's poultry production capacity, and Brazil's exporters apparently began to take advantage of Argentina's domestic poultry meat deficit in 1992.

Unlike the world's other broiler meat exporters, Brazil's broiler export sector is competitive in exporting both whole broilers and parts. The U.S. has a distinct competitive advantage in exporting bone-in-legs and leg quarters; Thailand and China in further processed parts; and the EC's exports to non-EC countries are primarily whole broilers. Brazil's broiler sector, on the other hand, has the capacity and flexibility to produce both whole birds and a diverse array of parts, which are competitively priced on the world market. In the past, whole bird exports to the Middle-East had been the mainstay of Brazil's export sector. But Brazil's sector has diversified, and Brazilian exports of parts are growing. In 1992, Brazil's exports of parts are estimated to have been around 150,000 tons, about a 27 percent increase over the previous year.

Exports of parts to the EC are estimated to have almost doubled during 1992, and will likely account for about 10 percent of Brazil's total broiler exports during 1992. The growth in sales to the EC occurred despite measures taken by the EC to curb Brazilian imports. Alleging dumping, the EC imposed a countervailing duty on imports of Brazilian broiler parts of about $620 per ton in May of 1992. The duty was subsequently reduced to $400 per ton in July, but then increased again to $800 per ton in September. Brazil's exporters deny the EC's claims that they have been dumping and suggest that they simply have lower costs than producers in the EC.



The largest importer of Brazil's broilers continues to be Saudi Arabia, which purchases about a third of Brazil's total broiler exports. Brazilian exports to Saudi Arabia were likely around 125,000 metric tons in 1992,

slightly higher than in 1991. Though still facing stiff competition from the EC, Brazil has been able to hold its market share in Saudi Arabia's whole bird import sector at around 47 percent. After Saudi Arabia, Brazil's next most important market is Japan, which imports about 18 percent of Brazil's broiler exports. Brazil's exports to Japan, almost all of which are parts, are estimated to have been around 65,000 tons in 1992, about a 30 percent increase over the previous year. Due to the higher duty placed on Brazil's parts exports to the EC in the latter part of 1992, and persisting stocks in Japan, Brazil's exports are projected to decline somewhat in 1993.

EC BROILER EXPORTERS LOOK INWARD FOR MARKET OPPORTUNITIES

Broiler meat production in the EC is estimated to have been about 4.8 million tons in 1992, a little over 1 percent greater than the previous year. With the exception of the United Kingdom and Spain, broiler production in all EC countries is estimated to have increased. Production in France and the Netherlands, the EC's two most important broiler exporters, increased about 1.5 and 5.2 percent, respectively. The growth in consumption of broiler meat moderated somewhat in 1992, leading to growing stock levels throughout the EC and declining prices. For example, stock levels in the Netherlands were expected to have been up 50 percent at the end of 1992, and Dutch producer prices were 20 percent below the previous year's prices. Production and distribution forecasts for 1993 indicate that stock levels are likely to continue growing, which may mean that the market within the EC will be facing a prolonged period of depressed prices.

In 1992, trade within the EC is estimated to have increased by about 4 percent, while exports to destinations outside the EC are gauged to have increased around 3 percent. Imports from countries outside the EC, primarily from Brazil and Thailand, were rising during the first few months of 1992, adding to the growing stock levels. In order to stymie the growth in imports from non-EC countries, the duty on parts imports from Brazil and Thailand was increased during 1992.

France, the leading exporter of broiler meat in the EC, is estimated to have shipped around 415,000 tons of broiler meat in 1992, approximately 4 percent more than in 1991. France exported about 40 percent of its domestic production in 1992, a majority of which was delivered to non-EC countries. Though Saudi Arabia was still France's number one market outlet, French exports to Saudi Arabia are expected to have declined about 7 percent in 1992. In the past few years, French exporters have been increasingly focussing on exporting fresh broiler meat to markets within the EC. This attention evidently paid off in 1992 as France is estimated to have increased broiler meat exports within the EC by about 18 percent. With the current over-supply situation within the EC, there exists a state of heightened competition among the EC's broiler exporters, and France will face highly contested markets within the EC in 1993. Consequently, the growth in France's exports to other EC countries in 1992 is expected to be not as robust as in 1992.

After France, the Netherlands is the EC's second leading exporter of broiler meat. However, exports are much more important to the overall performance of the Netherlands' domestic sector as the Dutch consistently export between 60 and 70 percent of domestic production. In 1992, Dutch exports are estimated to have been around 338,000 tons, up about 7 percent from the previous year. Increased exports to destinations outside the EC occurred mainly in the form of shipments of whole frozen broilers to African countries and of chicken parts to China and Hong Kong. Estimated to have been 85 percent of total exports in 1992, the majority of Dutch exports continue to go to other EC countries. Germany is the Netherlands' leading broiler export market, purchasing about 60 percent of total Dutch broiler exports in 1992. In 1993, opportunities for Dutch exports within EC are expected to decline as Germany's import demand slows due to expanding production capacity in former East Germany.

DEVELOPMENTS IN THE MEXICAN POULTRY AND EGG MARKETS

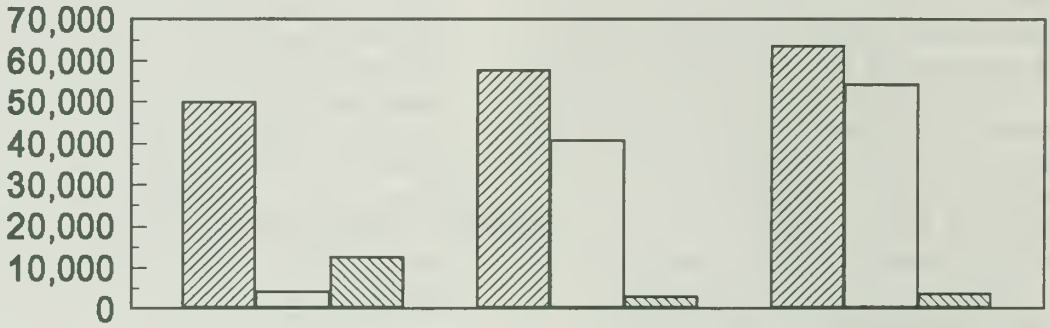
Despite the barriers of tariffs and import licenses, Mexico has been a rapidly growing market for U.S. poultry and eggs in recent years. By both reducing these barriers and encouraging greater overall economic growth, the proposed North American Free Trade Agreement (NAFTA) is expected to stimulate even higher sales of U.S. poultry products to Mexico in the future. At the same time, NAFTA will lead to expanded Mexican imports of lower-priced U.S. grain, helping to lower feed costs and boost the productivity of Mexico's domestic poultry industry.

Poultry Production

The 1993 forecast for total poultry meat production in Mexico is 1.09 million tons. Spurred by new investments by the largest poultry firms, broiler production, which accounts for 95 percent of Mexico's total poultry meat output, is forecast to achieve another record level of 1.03 million tons in 1993. Increases in production capacity, adequate feed supplies and credit availabilitity, and strong domestic demand are additional factors contributing to the rapid production increase in recent years. Despite complaints by Mexico's poultry producers about oversupply problems and reduced returns, total poultry meat production should continue to expand in coming years.

Broiler Production Areas

Major broiler producing states in Mexico are: (the state of) Mexico, Jalisco, Guanajuato, Veracruz, and Nuevo Leon. On average,



Year	1988	1991	1992\1
Broilers\2	49,949	57,518	63,301
Turkeys	4,204	40,441	54,145
Table Eggs \3	12,347	2,950	3,427

\1 Includes only the first 11 months of 1992

\2 Does not include other poultry meat

\3 Does not include hatching or frozen eggs

each state produced 11 percent of the total production from 1988 to 1991. Continued annual growth in broiler production is expected in 1992-93, but this is dependant on the possible oversupply of broiler meat in consumer markets and an adequate supply of feedstuffs.

Turkey Production

Turkey production estimates for Mexico have been revised downward for 1992 and 1993 from previous reports. Still, a record production of 14,000 metric tons is forecast for 1993. Two major factors have directly affected the revisions in production figures. First, a record amount of U.S. turkey products entered Mexico in 1991-92, putting pressure on domestic production. Second, in the early 1990's leading turkey meat processors in Mexico began to diversify into broilers, to reduce losses attributable to the seasonal demand for whole turkeys.

During the 1980's, producers believed that broilers were more profitable in the long run. While most Mexican producers believe turkey production has a higher return during the months of November, December and January, the seasonality of turkey production and processing diminishes yearly profits.

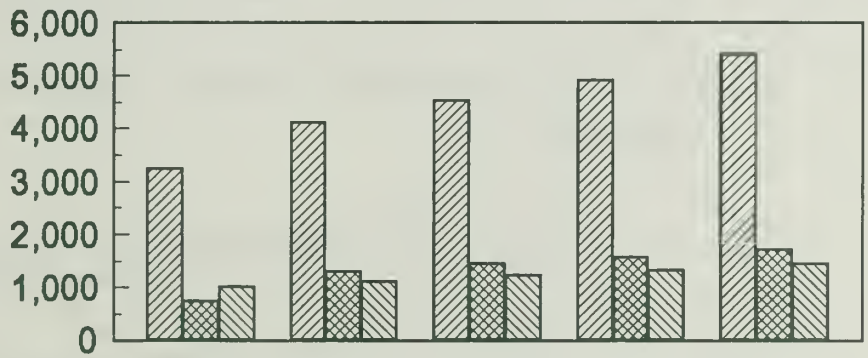
Mexico has only two major turkey producing companies, and these companies produce 80-85 percent of the Mexico's domestic turkey output. The remaining producers are mostly backyard type operations and/or family farmers raising turkeys to supplement income.

Poultry Feed Supplies

From 1988 to 1991, feed supplies for poultry production increased 36 percent, from 4,969 MT to 7,790 MT. Grain sorghum is by far the main feed grain, accounting for 80-85 percent of the feed used in Mexico in the production of poultry products. Although many domestic producers would prefer a mixture of corn and sorghum as the main feed

Mexican Poultry Sector Feed Consumption 1988-92

1,000 Metric tons



Year	1988	1989	1990	1991	1992(p)
Feed Grain -Sorghum	3,230	4,104	4,527	4,908	5,390
Oilseeds -Soybeans	745	1,303	1,437	1,558	1,712
Other Feed Ingredients	999	1,107	1,222	1,324	1,454

1\ For broilers, turkeys, and egg production

(p) preliminary

ingredient, limited domestic corn supplies restrict its use. Most of Mexico's domestic corn production is for human consumption.

The Government of Mexico provides few direct incentives for poultry producers, and feed costs are high by world standards. The government's domestic and trade policies for feed grains and oilseeds have a significant effect on the Mexican poultry meat and egg industry. Domestic crop price supports and border protection through such measures as state-trading, import licensing, and tariffs have allowed internal price levels of feed grains and oilseeds to rise above those on the world market. High internal transportation cost contribute to the high cost of Mexican feed stuffs. Since feed constitutes the major cost component for most producers, domestic poultry meat and egg producers face a higher cost structure as a result of these policies.

To meet the demand for feedstuffs, larger poultry companies operating in Mexico are actively seeking additional permits for corn and sorghum imports from the United States. Currently, U.S. grain sorghum is the major feed imported into Mexico, largely because of import restrictions on U.S. corn. The Mexican Department of Commerce (SECOFI) does not commonly approve import permits for corn for use as a feed grain. The Government of Mexico has indicated that it may assist producers by eliminating the 15 percent import tariff for sorghum in advance of the North America Free Trade Agreement (NAFTA) requirement.

Broiler Prices

Only over the past few years have broiler prices been determined by market forces in Mexico. Fierce competition among domestic broiler producers for a larger market share is beginning to cause severe financial problems for some smaller to medium size producers. Driven by favorable price returns in 1990 and 1991, medium and large poultry companies in Mexico expanded broiler production capacity. Relatively depressed prices in mid-1992 were mainly due to greater competition among Mexican poultry companies, although some in Mexico blamed increased imports from the United States for contributing to a surplus of chicken meat. Less efficient poultry producing companies with limited distribution systems will continue to struggle and operate near or below breakeven levels. Large producers are gaining market share at the expense of medium and smaller producers due to economies of scale.

Although production costs vary from

Year\$	1989	1990	1991	1992
Wholesale /3	1.37	1.38	1.20	0.93
Supermarket	2.34	2.50	2.27	2.11
Public Maket	2.15	2.24	2.03	2.19

1\ FOB, Prices Converted Using Official Exchange

2\ Dollars per kilogram

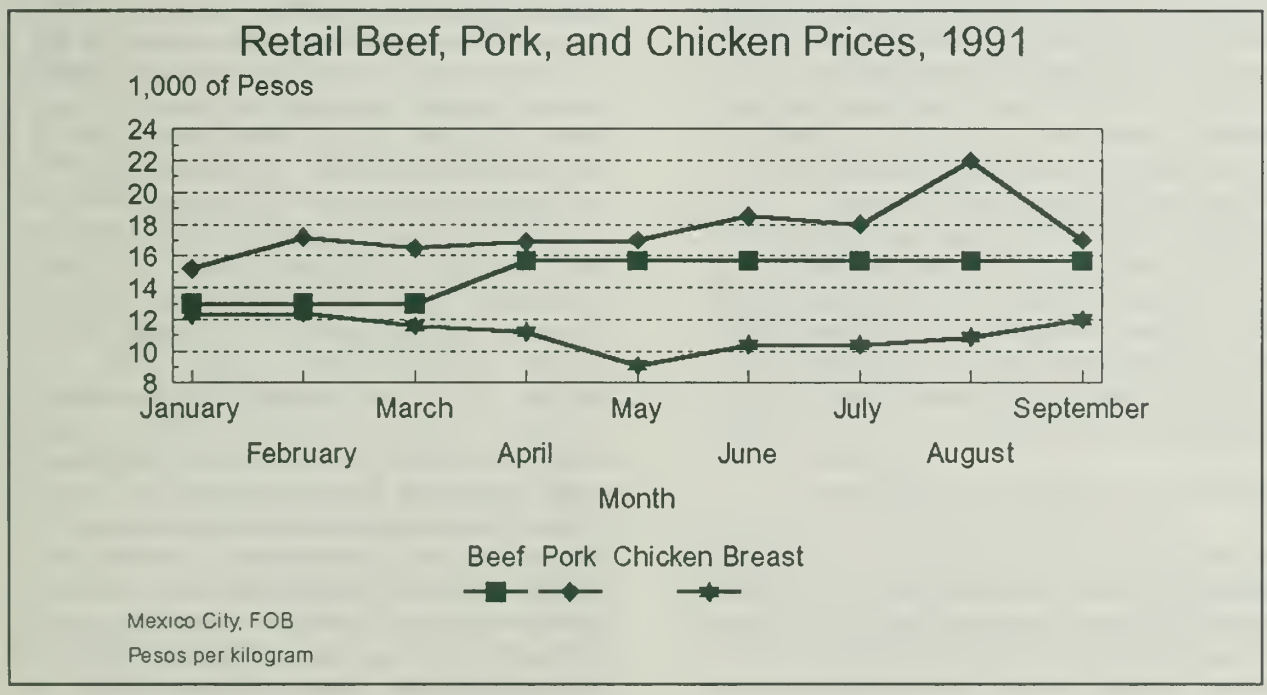
3\ Live Whole Birds

producer to producer, most producers can profit when broiler prices are above 4,000-4,200 pesos per kilogram (U.S. $1.34-1.41), live weight. Compared to U.S broiler production costs, Mexican broiler production costs twice as much. U.S. broiler production cost per kilogram is about ($.66 -.68), live weight. While in the near future there is a lot of uncertainty about broiler prices. It is generally believed that retail prices could stabilize by mid-1993.

Broiler Consumption

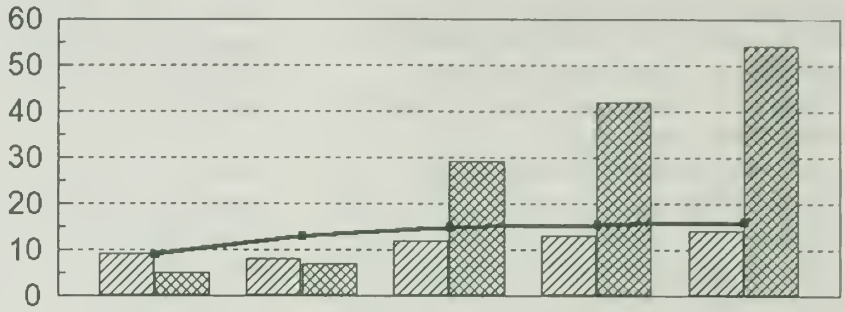
Mexico's per capita poultry meat consumption continues to increase due to attractive retail prices and an increasing number of retailers and fast food restaurants offering chicken meat products. In 1989, beef had the highest per capita consumption followed by pork then poultry meat. By 1992, Mexico's per capita consumption of poultry meat had increased to 12 kilograms yearly while pork consumption had fallen to 9.6 kilograms. Mexican per capita beef consumption increased to 19.5 kilograms in 1992, which is up slightly from the previous year. The per capita consumption of poultry meat is expected to be 13 kilograms in 1993. Inexpensive U.S. imports are a major reason for increases in Mexico's per capita poultry meat consumption. Reduced availability and higher retail costs for pork and beef are other reasons for the switch in consumption patterns. With recently imposed import tariffs on beef, a continued substitution of chicken meat for beef may be expected.

Demand for chicken meat is highest in the heavy populated areas, as expected, but rising most rapidly in Mexico's northern border areas. Two major reasons explain this rapid increase. First, several large jointly owned U.S. and Mexican poultry companies have entered into operations to process U.S. imported whole chicken in Mexico's maquiladora plants. Whole chickens imported from the United States are further processed, with the specialty products, mainly white meat, being re-exported. Although the Mexican maquiladora (The concept of U.S. products being exported to factories in Mexico were additional work or assembly is done. Upon completion of this work the finished products are re-exported.) concept has been around for years, it is relatively new in the poultry industry, and is now beginning to take hold. Second, many large Mexican distribution companies have



Mexican Turkey Production/Imports/Prices 1989-93

1,000 Metric tons



Year	1989	1990	1991	1992(p)	1993(f)
Mexican Production	9.0	8.0	12.0	13.0	14.0
U.S Exports to Mexico	5.0	7.0	29.0	42.0	54.0
Turkey Prices /1 /2	9.0	13.0	15.0	15.5	16.0

/1 Prices for Whole Turkeys during Christmas

2/ FOB to Mexico City, Pesos per Kilogram

(p) preliminary figures, (f) forecast

border warehouses (in conjunction with maquiladora facilities) in Mexico's northern free-trade zones. As shipments enter Mexico, U.S. export documentation does not generally indicate its final destination in Mexico. Products that are exported into free-trade zones are usually those that are re-exported or broken down into smaller packages and distributed throughout the country. Many believe that the maquiladora poultry industry in northern Mexico will increase the quantities of U.S. whole chickens that will be imported when the NAFTA is ratified. Despite the growing poultry meat market in the north, Mexico City still continues to consume over 50 percent of Mexico's total broiler meat. Other large consumer centers are Monterrey and Guadalajara.

Consumer Taste and Preferences

Mexicans prefer fresh whole broilers over frozen products. Poultry products with color enhancement obtained through a marigold extract blended in to the feedstuffs, or through artificial coloring are preferred in Mexico. Broilers are sold through three basic market channels: public markets, super-markets, and resorts/restaurants. Contrary to U.S. consumption patterns, Mexico has a strong demand for parts such as legs, leg quarters and wings, and the price gap between breast meat and chicken parts is not as wide as in the United States. The public market accounts for about 80 percent of total sales. Less than 10 percent of the total chicken meat consumed in Mexico City is sold through supermarkets. In public markets, consumers purchase whole birds which have been slaughtered and defeathered, but which retail with all offals, including the head and feet. The main problem in this marketing channel is the spoilage that occurs with birds that are not eviscerated. Since most of the chickens sold in Mexico are not eviscerated, shelf life at public markets is limited. 'Broiled' or 'roasted' whole birds normally have white skin and are sold in specialized, roasted chicken stands. In addition to the specialized stores, fast food outlets are also selling increased amounts of chicken meat. Only recently have some companies begun to sell branded, chilled chicken meat

products in Mexico's supermarket chains.

Turkey Consumption

Changing consumer preferences, price competitiveness and the quality of imported products are the major reasons for the dramatic increase in Mexico's turkey consumption. The surge in domestic consumption is expected to have reached 55,000 metric tons in 1992, and increase another 4-5 percent in 1993. Currently, the per capita consumption of turkey is .60 kilograms yearly which is triple the amount of five years ago. U.S. produced turkey meat parts and to a lesser extent, imported turkey sausages, are extremely popular and account for 80-85 of all turkey meat consumed in Mexico. Additionally, several companies processing sausage are using an increasing amount of processed turkey meat imported from the United States to produce a relatively new and very popular sausage under domestic brand names. (Mexico's supply shortage of pork has forced several sausage companies to develop new products as close substitutes to traditional pork products. Mixing turkey meat with pork, has became a popular sausage substitute for consumers.) Traditional whole turkeys account for less then 15 percent of total turkey consumption. Whole turkeys are consumed mainly during the holiday season and have very little appeal thereafter.

To meet the growing demand for turkey, the Mexican government relaxed import permit requirements prior to the NAFTA, allowing increased market access for U.S. turkey exporters. Projected imports of turkey products by Mexico for 1993 have been revised upward to 54,000 metric tons.

Turkey Retail Prices

From 1989 to 1991, Mexico's average retail prices for whole turkey meat doubled. Still, relatively low prices for processed products make turkey an alternative to more expensive pork and beef products. A modest growth in price is expected for 1993, but turkey meat products will remain an attractive buy for Mexican consumers. As turkey products such as parts, sausages, and turkey based sandwich spreads begin to be more common in the market, producers and processors (U.S. turkey imports are used mainly for Mexico's domestic sausage industry) anticipate lower prices due to lower production costs. Some industry sources believe the lower retail cost may be short lived due to newly restrictive import controls placed on processed turkey and chicken meats. (See Section on Technical Contraband)

Poultry Trade and NAFTA

Mexico is forecast to import 129,000 metric tons of poultry meat products in 1993. Broiler meat imports were approximately 74,000 metric tons in 1992, with dark meats, leg quarters and wings being the majority of imports.

Current Mexican import policies maintain a system of licenses and a 10 percent tariff on imports of poultry. The barriers are designed, in part, to protect Mexican poultry producers from U.S. competition. When the North America Free Trade Agreement (NAFTA) goes into effect, Mexico will convert its import licensing regime for fresh, chilled and frozen poultry imported from the United States to a transitional tariff-rate quota (TRQ). The TRQ's will be in effect for 10 years, after which there will be no restrictions.

For the United States, duty-free access to the Mexican market will be assured for an initial 95,000 metric tons of poultry, which will grow at a 3-percent annual compounded rate over the 10-year transition period. Trade liberalization in poultry between Mexico and Canada was excluded from the NAFTA; hence there will be no elimination of tariffs or non-tariff barriers for Mexican-Canadian trade in these products.

U.S. exports to Mexico in excess of the 95,000 metric tons will be assessed a tariff, based on the "tariffication" of Mexico's import license. The tariffs initially will be $1,850 per metric ton, but not less than 133 percent ad valorem, for whole turkey; and $1,680 per

metric ton, but not less than 260 percent ad valorem, for chicken and other poultry. Over the first 6 years of the agreement, an aggregate 24 percent of these over-quota tariffs will be eliminated; the remainder will be phased out over the rest of the 10-year transition period.

Separate TRQs will be established for the following U.S. poultry and poultry products exported to Mexico (quota amount in metric tons, over-quota tariffs in percent ad valorem and in U.S. dollars per metric ton):

Transitional Tariff-rate quotas for Poultry

	NAFTA TRQs	Over-Quota Tariff Percent	$ per Metric ton
Whole Turkeys	2,000	133	1,850
Other Whole Poultry	13,000	260	1,680
Turkey Parts \1	28,000	260	1,850
Other Poultry parts	25,000	260	1,680
Mechanically deboned	27,000	260	1,680
Total	95,000		

1\includes offals

Mexican poultry producers seem generally satisfied with provisions and terms of the NAFTA. Producers believe that they will be protected during the first six years of the NAFTA. They believe that a more concentrated industry will be better prepared to compete against imported products, particularly legs, leg quarters, and wings.

Mexico is not currently eligible to export chicken and turkey meat to the United States due to the absence of a food safety and an animal health inspection system equivalent to that in the United States. Mexican producers recognize the need to make additional efforts to eradicate animal diseases. The National Association of Poultry Producers (UNA) and the government are focusing on animal health campaigns to eradicate poultry diseases which impede access of Mexican poultry products to U.S. markets.

In 1992, Mexico exported 10,000 metric tons of processed chicken meat, with the majority of this being exported to Japan and Hong Kong. Although a small amount compared to U.S. exports, many industry experts predict increasing export market potential for Mexican poultry after the NAFTA is passed due to cheaper U.S. feed grain imports. The majority of Mexico's poultry meat exports were U.S. whole broilers imported for further processing and re-exported to Japan and Hong Kong markets. Mexico's poultry exports represents less then one percent of its total domestic poultry meat production.

Poultry Market Opportunities

Under NAFTA, the removal of tariffs and licensing requirements and the expected growth in Mexican income will expand the market for poultry, especially for leg quarters and mechanically deboned meat. However, the potential benefits to U.S. poultry producers will likely be moderated over the longer term by a reduction in the costs of producing Mexican poultry with imported lower-priced U.S. feeds. With NAFTA, U.S. poultry exports to Mexico are expected to increase by 40 percent, (according to some industry experts) increasing U.S. poultry production by the end of the transition period by one percent above the levels that might be achieved without a NAFTA.

Egg Production

Mexico's 1993 egg production is expected to reach a record high of 20,140 million pieces. Both the 1992 and 1993 egg forecasts are reduced from previous reports to reflect the economic losses which occurred in mid-1991. (See "Producer and Retail Prices for Eggs")

Some industry specialists believe that the cost of feedstuffs and the lack of carton boxes for table eggs are the two underlying reasons for the revisions in Mexico's egg production. Although decontrol of table egg prices has increased the demand for egg products, producers fear that the lack of cheap feed will continue to reduce competitiveness with U.S. egg imports. As

with Mexican poultry producers, egg producers want the government to facilitate imports of feedstuffs to reduce costs and improve competitiveness. Egg producers reported that almost all carton dozen boxes are imported from the United States. The dependance on twelve-egg carton boxes from the United States is a major constraint to increased domestic production.

Like the domestic broiler industry, the Mexican egg industry continues to modernize and become concentrated in to a smaller number of large, vertically integrated companies. Industry analysts expect that some companies may attempt to market and distribute products directly to avoid the excessive margins made by middlemen. Additionally, better genetics and improved operation and administration of egg companies have resulted in increasing productivity. The average production per layer for the entire industry in 1992 had increased by four percent since 1985, and is now estimated at 258 eggs per year.

Egg Production Areas

Mexico's 1992 total egg production is believed to have decreased by one percent from the previous year, with three percent growth forecast for 1993. Egg production is concentrated around Mexico City and other large population areas. Currently, the states of Jalisco and Puebla produce over 50 percent of Mexico's table eggs.

Egg Consumption

Currently, the yearly per capita consumption of eggs in Mexico is around 190 pieces. Mid and upper income consumers continue to have a strong demand for brown eggs marketed in boxes of one dozen. In the past, Mexican consumers purchased table eggs individually or by the kilogram. The use of dozen carton boxes is still relatively new and is still the way eggs are usually sold only in large supermarkets. As previously indicated, supplies of dozen cartons continue to be an obstacle to expanded sales of these products.

Producer and Retail Prices for Eggs

As a result of lower table egg supplies in mid 1992, producer and retail prices increased faster than the domestic rate of inflation. In a effort to control retail prices, overcome spot shortages in areas far from producing regions, and to meet seasonal production shortages during the winter months, the Mexican government has commonly issued import permits for table eggs The former government policy of implementing strict price controls on table eggs, particularly at the retail level, was recognized by government officials as ineffective.

In the 1992, the government of Mexico, through the Secretariat of Commerce and Industry Development (SECOFI), approved import permits for 180,000 cases of 360 eggs each to push down prices in the domestic market, particularly in Mexico City, which is the largest consumer center in Mexico. In turn, SECOFI divided the import permits among the National Association of Egg Distributors, the National Association of Poultry Producers, and the National Association of Supermarkets and Department Stores.

In early November 1992, SECOFI approved two additional import permits for 100,000 cases. However, these import permits have not been used since producer prices have fallen in anticipation of declining prices, similar to that which occurred following previous imports. Specialists report that the approval of table egg imports forces domestic producers to reduce prices by extending layer production cycles at unprofitable levels to meet seasonal shortages. Many producers believe that if seasonal shortages do occur, and if the Mexican government eliminates the import license system, the domestic egg industry would suffer. Even with high transportation costs, many traders report cheaper prices for table eggs in the United States than in Mexico since mid-1992.

Although an egg shortage is not predicted for 1993, a shortage did occur in mid-1992. Mexican industry experts believe that the

domestic egg shortage was not caused by consumer demands exceeding domestic supplies, rather that producers overreacted to the GOM decision to deregulate egg prices in 1991. Egg producers, reacting to the anticipated oversupply of eggs, began reducing flocks in mid-1991 causing a shortage, particularly of brown eggs, by early 1992. In mid-1992 the GOM, anticipating a large price increase on eggs, allowed egg imports to enter the country and agreed to liberalize egg prices at all levels.

Consequently, from the first part of 1991 to mid-1992 egg prices were extremely high due to shortage of eggs. Consumers on average paid 10 percent more for table eggs during this period. Producers earn attractive margins when prices are above production costs, estimated at roughly 2,800-3,000 pesos (U.S. $0.88-0.95) per kilogram. Industry experts believe that SECOFI will issue import permits for table eggs if domestic egg prices increase above 3,000-3,300 pesos per kilogram (U.S. $0.95-$1.04). One of the Government of Mexico's main priorities in 1993 is to reduce inflation to 7 percent. The government could use lower priced imported eggs to help to accomplish its objective should the need arise.

Table Egg Quality, Safety, and Health Regulations

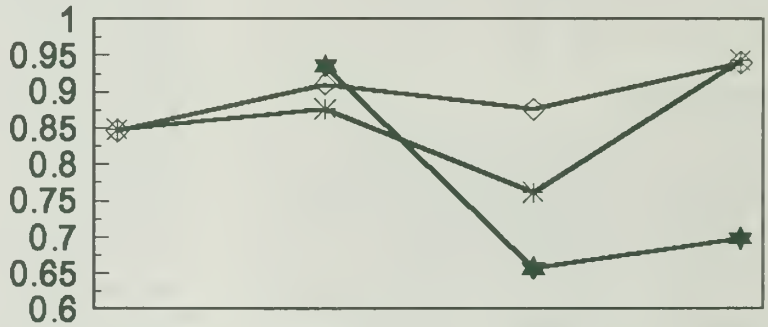
The Secretariat of Commerce and Industrial Development (SECOFI) enforces a quality standard for shell eggs for human consumption marketed in cartons of one dozen eggs. This standard is called "Mexico 1". Eggs under this category are the highest quality available in the domestic market, weighing 56-63 grams and sold within 14 days after laying. Egg producers marketing their product in cartons of one dozen must be National Association of Poultry Producer (UNA) members, have appropriate facilities to produce eggs, be recognized by the Secretariat of Agriculture, have a brand recorded by SECOFI, and have a certificate from UNA, indicating that the egg producer observes all of these requirements.

Egg Trade and NAFTA

Mexico imported approximately 110 million eggs in 1992 and it is expected that 93 million eggs will be imported in 1993. If the

Mexico City: April - Table Egg Prices

U.S. Dollars \3



Year\$	1989 /1 /2	1990	1991	1992
Producers Wholesale		0.936	0.657	0.698
Public Market Retail	0.847	0.911	0.876	0.940
Supermarket Retail	0.848	0.877	0.762	0.943

1\ GOM set Price, FOB Mexico city

2\ Price controls lifted 1991

3\ $Dollars per kilogram, Official Exchange rate

domestic retail price of eggs peaks above the Government of Mexico's limit, the government will grant import permits for table eggs. If domestic production reaches its expected higher level and the demand for eggs continues a downward trend, the future for U.S. eggs exports into Mexico could be substantially lower than expected for 1993. Mexico did not export table eggs in early 1992 as previously forecast due to reportedly unattractive prices in international markets. Mexico can not export fresh table eggs to the United States because of animal health restrictions. Freight cost and price competitiveness are other major obstacles to exporting table eggs from Mexico.

Expected higher Mexican incomes under the NAFTA will likely stimulate additional demand for eggs. However, lower-priced U.S. grain imports will offset declines in Mexican producer prices for eggs and lead to increased egg production. Since high feed costs in Mexico make egg producers less competitive, licenses are designed, in part, to protect Mexican egg producers from lower cost U.S. eggs. When the NAFTA goes into effect, Mexico will convert its import licensing regime for table and hatching eggs imported from the United States to a transitional tariff-rate quota (TRQ). The TRQ will be in effect for 10 years, after which trade will not be restricted.

Initially, the United States will have duty-free access to the Mexican market for 9.6 million dozen, a quantity which will grow at a 3-percent annual compounded rate over the 10-year transition period. U.S. exports to Mexico which exceed the 9.6 million dozen limit will be assessed a tariff, initially equal to 50 percent ad valorem. Over the first six years of the agreement, an aggregate 24 percent of this over-quota tariff will be eliminated. The remainder will be phased-out over the rest of the 10-year transition period. Eggs were excluded from trade liberalization in the NAFTA for Mexico-Canada two-way trade.

Egg Marketing Opportunities

Under the NAFTA, the removal of licensing requirements and the growth in Mexican income will expand the market for eggs. Despite an expected decline in Mexican producer prices for eggs, lower feed costs resulting from NAFTA will stimulate increased egg production. Nevertheless, U.S. egg exports to Mexico have been forecast to be 400-500 million eggs, by the end of the transition period, several times the level which would be expected without the NAFTA. Since U.S. egg exports are only a small share of U.S. production, the increase in exports to Mexico will have only minimal effect on the U.S. egg industry.

Technical Contraband

Mexican imports of chilled and frozen chicken meat are presently subject to permits, and tariffs of 10 percent, while only import tariffs of 20 percent are applied to processed meats. The Secretariat of Commerce and Industry Development commonly grants a limited number of import permits for uncooked chicken and turkey meat to meet demand in border areas.

Mexican producers claim that in recent years some fresh, chilled, and frozen poultry meat imports have entered the country illegally by the use of inappropriate tariff numbers for processed meat (referred to as "technical contraband") In early 1992, the Government of Mexico agreed with poultry producers to improve border controls to avoid technical contraband of chicken parts. To do so, the government modified its definition of processed poultry meat in the harmonized tariff schedule under tariff numbers 16.02.31.01--Prepared or preserved turkey meat, and 16.02.39.99-- Other (Preserved poultry meat). The government, through animal health certificates granted by the Mexican Department of Agriculture (SARH), may now refuse entrance of fresh, chilled and frozen chicken meat parts unless the product is considered processed meat in accordance with the redefined tariff description.

TOTAL POULTRY MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	656	659	701	708	710	724
MEXICO	592	635	700	840	990	1,090
UNITED STATES	9,272	9,931	10,645	11,204	11,852	12,244
SUBTOTAL	10,520	11,225	12,046	12,752	13,552	14,058
CENTRAL/SOUTH AMERICA						
GUATEMALA	78	83	94	108	127	152
DOMINICAN REPUBLIC	73	104	113	102	112	115
ARGENTINA	370	315	335	430	520	520
BRAZIL	1,997	2,139	2,416	2,691	2,925	3,195
VENEZUELA	373	253	225	313	325	341
SUBTOTAL	2,891	2,894	3,183	3,644	4,009	4,323
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	186	179	181	181	187	190
DENMARK	117	128	131	137	139	142
FRANCE	1,434	1,550	1,651	1,759	1,820	1,870
GERMANY	576	603	599	574	611	640
GREECE	150	154	160	160	162	163
IRELAND	76	70	81	81	81	81
ITALY	996	1,025	1,069	1,051	1,056	1,056
NETHERLANDS	485	491	526	547	565	575
PORTUGAL	205	207	213	234	237	248
SPAIN	829	831	836	875	865	864
UNITED KINGDOM	1,056	1,070	1,087	1,248	1,235	1,260
SUBTOTAL	6,110	6,308	6,534	6,847	6,958	7,089
OTHER WESTERN EUROPE						
AUSTRIA	75	75	78	83	87	89
FINLAND	28	31	33	37	35	39
SWITZERLAND	31	33	33	35	36	37
SUBTOTAL	134	139	144	155	158	165
EASTERN EUROPE						
CZECHOSLOVAKIA	211	216	238	215	215	220
BULGARIA	183	198	200	175	175	175
ROMANIA	370	365	425	410	335	310
HUNGARY	465	420	426	320	335	350
POLAND	351	348	328	320	330	350
FORMER YUGOSLAVIA	330	320	295	245	225	200
SUBTOTAL	1,910	1,867	1,912	1,685	1,615	1,605
FSU-12	3,107	3,233	3,169	2,982	2,500	2,400
BALTIC STATES	117	125	118	115	90	80
SUBTOTAL	3,224	3,358	3,287	3,097	2,590	2,480
MIDDLE EAST						
ISRAEL	178	171	173	188	193	199
KUWAIT	20	21	18	1	9	15
SAUDI ARABIA	248	240	265	285	303	318
TURKEY	236	254	269	284	330	335
UNITED ARAB EM.	14	14	14	14	15	16
SUBTOTAL	696	700	739	772	850	883
AFRICA						
EGYPT	279	254	235	225	210	215
SOUTH AFRICA, REP OF	545	552	563	558	547	560
SUBTOTAL	824	806	798	783	757	775
ASIA						
INDIA	221	289	334	362	383	406
CHINA (PRC)	2,744	2,820	3,229	3,952	4,500	5,200
HONG KONG	35	34	32	29	28	28
JAPAN	1,471	1,482	1,451	1,383	1,356	1,327
KOREA, REPUBLIC OF	235	243	269	324	330	350
PHILLIPPINES	235	263	279	287	305	335
SINGAPORE	63	58	56	58	54	53
TAIWAN	418	462	476	480	500	510
THAILAND	511	553	595	655	710	755
SUBTOTAL	5,933	6,204	6,721	7,530	8,166	8,964
OCEANIA						
AUSTRALIA	401	406	419	425	440	455
NEW ZEALAND	50	55	62	60	64	67
SUBTOTAL	451	461	481	485	504	522
TOTAL	32,693	33,962	35,845	37,750	39,159	40,864

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	703	698	738	751	778	786
MEXICO	646	684	741	925	1,102	1,209
UNITED STATES	8,907	9,529	10,048	10,565	11,078	11,517
SUBTOTAL	10,256	10,911	11,527	12,241	12,958	13,512
CENTRAL/SOUTH AMERICA						
GUATEMALA	78	83	94	110	133	160
DOMINICAN REPUBLIC	100	100	100	102	112	115
ARGENTINA	373	324	331	437	550	542
BRAZIL	1,757	1,891	2,111	2,364	2,550	2,850
VENEZUELA	373	253	203	290	301	316
SUBTOTAL	2,681	2,651	2,839	3,303	3,646	3,983
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	172	161	158	159	162	167
DENMARK	59	60	60	65	67	69
FRANCE	1,083	1,183	1,215	1,241	1,255	1,265
GERMANY	807	845	872	975	1,027	1,067
GREECE	154	157	165	165	167	171
IRELAND	80	80	80	81	82	83
ITALY	1,015	1,050	1,083	1,069	1,079	1,079
NETHERLANDS	221	232	260	267	280	290
PORTUGAL	206	210	216	231	233	238
SPAIN	879	895	905	941	942	946
UNITED KINGDOM	1,075	1,100	1,155	1,285	1,328	1,348
SUBTOTAL	5,751	5,973	6,169	6,479	6,622	6,723
OTHER WESTERN EUROPE						
AUSTRIA	90	92	93	101	105	107
FINLAND	28	31	33	36	38	40
SWITZERLAND	73	76	73	77	78	79
SUBTOTAL	191	199	199	214	221	226
EASTERN EUROPE						
CZECHOSLOVAKIA	201	211	206	208	210	215
BULGARIA	153	168	170	170	170	170
ROMANIA	257	254	463	446	372	361
HUNGARY	251	243	235	210	210	230
POLAND	321	335	311	318	328	344
FORMER YUGOSLAVIA	317	310	293	240	218	223
SUBTOTAL	1,500	1,521	1,678	1,592	1,508	1,543
FSU-12	3,061	3,178	3,122	3,009	2,800	2,634
BALTIC STATES	70	73	74	72	66	66
SUBTOTAL	3,131	3,251	3,196	3,081	2,866	2,700
MIDDLE EAST						
ISRAEL	158	144	159	175	180	184
KUWAIT	56	57	28	21	36	40
SAUDI ARABIA	467	424	445	506	546	564
TURKEY	228	252	268	283	330	335
UNITED ARAB EM.	39	40	41	21	36	40
SUBTOTAL	948	917	941	1,006	1,128	1,163
AFRICA						
EGYPT	314	279	237	227	212	225
SOUTH AFRICA, REP OF	568	546	568	565	548	564
SUBTOTAL	882	825	805	792	760	789
ASIA						
INDIA	221	289	334	362	383	406
CHINA (PRC)	2,676	2,795	3,187	3,915	4,450	5,130
HONG KONG	161	183	195	214	238	242
JAPAN	1,743	1,763	1,761	1,765	1,770	1,784
KOREA, REPUBLIC OF	235	243	277	336	345	368
PHILLIPPINES	232	255	283	292	307	332
SINGAPORE	97	96	94	101	99	99
TAIWAN	417	459	471	475	495	505
THAILAND	413	442	451	486	545	565
SUBTOTAL	6,195	6,525	7,053	7,946	8,632	9,431
OCEANIA						
AUSTRALIA	399	406	417	423	436	451
NEW ZEALAND	50	54	58	62	65	68
SUBTOTAL	449	460	475	485	501	519
TOTAL	31,984	33,233	34,882	37,139	38,842	40,589

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS O FOFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	6	7	6	5	5	8
UNITED STATES	382	398	554	631	749	768
SUBTOTAL	388	405	560	636	754	776
SOUTH AMERICA						
ARGENTINA	0	0	4	1	1	1
BRAZIL	240	248	305	327	375	345
VENEZUELA	0	0	22	22	25	27
SUBTOTAL	240	248	331	350	401	373
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	59	65	77	89	92	94
DENMARK	62	71	79	77	79	82
FRANCE	402	474	497	559	625	670
GERMANY	47	58	81	74	84	91
IRELAND	5	5	4	5	5	5
ITALY	12	20	30	31	28	28
NETHERLANDS	337	340	376	422	445	460
SPAIN	10	6	4	7	3	3
UNITED KINGDOM	60	64	62	80	85	82
SUBTOTAL	994	1103	1210	1344	1446	1515
EX. INTRA EC TRADE	419	488	493	515	540	552
OTHER WESTERN EUROPE						
SWITZERLAND	1	0	0	0	0	0
SUBTOTAL	1	0	0	0	0	0
EASTERN EUROPE						
CZECHOSLOVAKIA	15	10	10	13	15	15
BULGARIA	30	30	30	30	30	30
ROMANIA	125	120	0	0	10	5
HUNGARY	234	174	189	145	135	140
POLAND	23	18	21	16	16	18
FOR. YUGOSLAVIA	12	15	11	8	5	3
SUBTOTAL	439	367	261	212	211	211
MIDDLE EAST						
ISRAEL	20	18	19	15	14	14
SAUDI ARABIA	3	2	1	2	4	5
TURKEY	8	2	1	1	1	1
SUBTOTAL	31	22	21	18	19	20
AFRICA						
SO. AFRICA, REP OF	11	11	1	1	6	2
ASIA						
CHINA (PRC)	92	94	110	123	145	170
HONG KONG	27	49	75	95	100	103
SINGAPORE	13	10	11	12	10	13
TAIWAN	4	4	5	5	5	5
THAILAND	98	111	144	169	165	190
SUBTOTAL	234	268	399	404	425	481
OCEANIA						
AUSTRALIA	2	1	2	2	4	4
SUBTOTAL	2	1	2	2	4	4
TOTAL	2,340	2,425	2,785	2,967	3,266	3,382
TOTAL (EXCL INTRA-EC TRADE)	1,765	1,810	2,068	2,138	2,360	2,419

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	43	42	53	56	66	70
MEXICO	54	51	46	90	117	129
SUBTOTAL	97	93	99	146	183	199
SOUTH AMERICA						
ARGENTINA	1	1	0	2	25	20
SUBTOTAL	1	1	0	2	25	20
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	45	47	54	67	68	71
DENMARK	3	6	8	8	6	6
FRANCE	55	71	67	64	60	60
GERMANY	316	334	398	475	500	518
GREECE	5	7	10	11	12	12
IRELAND	8	8	8	8	8	8
ITALY	31	45	44	49	51	51
NETHERLANDS	72	76	113	142	170	175
SPAIN	60	70	73	73	80	85
UNITED KINGDOM	79	84	135	137	168	160
SUBTOTAL	674	748	910	1034	1123	1146
EX INTRA-EC TRADE	114	139	196	213	212	198
OTHER WESTERN EUROPE						
AUSTRIA	15	17	15	18	18	18
SWITZERLAND	43	43	40	42	42	42
SUBTOTAL	58	60	55	60	60	60
FSU-12	179	210	277	130	40	65
SUBTOTAL	179	210	277	130	40	65
EASTERN EUROPE						
CZECHOSLOVAKIA	5	5	5	6	5	5
ROMANIA	7	7	48	32	55	53
POLAND	0	5	1	14	45	40
FOR. YUGOSLAVIA	0	1	2	2	2	2
SUBTOTAL	12	18	56	54	107	100
MIDDLE EAST						
KUWAIT	38	38	10	22	27	27
SAUDI ARABIA	194	194	209	245	250	253
UNITED ARAB EMIR.	25	27	27	22	27	27
SUBTOTAL	257	259	246	289	304	307
AFRICA						
EGYPT	25	25	2	2	2	10
SO. AFRICA, REP OF	6	5	6	8	7	6
SUBTOTAL	31	30	8	10	9	16
ASIA						
CHINA (PRC)	24	49	68	86	110	135
HONG KONG	153	198	239	280	312	317
JAPAN	272	281	301	358	407	412
SINGAPORE	46	48	52	52	56	58
TAIWAN	4	0	0	0	0	0
SUBTOTAL	499	576	660	776	885	922
TOTAL	1,808	1,995	2,311	2,501	2,736	2,835
TOTAL (EXCL INTRA EC-TRADE)	1,248	1,386	1,597	1,680	1,825	1,887

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	537	539	572	577	578	590
MEXICO	490	590	660	790	940	1,030
UNITED STATES	7,261	7,814	8,360	8,886	9,453	9,811
SUBTOTAL	8,288	8,943	9,592	10,253	10,971	11,431
SOUTH AMERICA						
ARGENTINA	340	300	305	415	500	500
BRAZIL	1,947	2,084	2,356	2,628	2,865	3,130
VENEZUELA	370	252	224	313	325	340
SUBTOTAL	2,657	2,636	2,885	3,356	3,690	3,970
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	150	144	147	156	161	165
DENMARK	102	110	116	121	125	127
FRANCE	844	898	959	995	1,010	1,010
GERMANY	327	355	334	316	335	350
GREECE	132	136	129	130	135	136
IRELAND	39	40	40	40	42	43
ITALY	593	608	632	615	620	620
NETHERLANDS	396	406	433	454	478	490
PORTUGAL	169	178	182	200	207	215
SPAIN	757	772	766	810	800	800
UNITED KINGDOM	801	770	798	935	925	940
SUBTOTAL	4,310	4,417	4,536	4,772	4,838	4,896
OTHER WESTERN EUROPE						
AUSTRIA	60	59	60	62	63	63
FINLAND	24	27	28	32	30	34
SUBTOTAL	84	86	88	94	93	97
EASTERN EUROPE						
CZECHOSLOVAKIA	184	162	185	161	162	165
ROMANIA	300	290	400	390	310	280
HUNGARY	368	330	290	215	220	230
POLAND	210	210	180	170	175	195
FORMER YUGOSLAVIA	265	258	243	196	182	170
SUBTOTAL	1,327	1,250	1,298	1,132	1,049	1,040
FSU-12	1,695	1,750	1,735	1,685	1,300	1,200
BALTIC STATES	65	70	65	65	50	45
SUBTOTAL	1,760	1,820	1,800	1,750	1,350	1,245
MIDDLE EAST						
ISRAEL	114	115	121	128	131	135
SAUDI ARABIA	248	240	263	275	292	308
TURKEY	150	180	260	275	320	325
SUBTOTAL	512	535	644	678	743	768
AFRICA						
EGYPT	219	195	185	170	150	155
SOUTH AFRICA, REP OF	467	480	494	507	499	510
SUBTOTAL	686	675	679	677	649	665
ASIA						
CHINA (PRC)	1,160	1,210	1,400	1,745	2,025	2,350
HONG KONG	24	23	22	20	20	19
JAPAN	1,346	1,355	1,332	1,269	1,260	1,230
THAILAND	498	538	575	630	680	720
SINGAPORE	52	48	45	48	44	43
TAIWAN	316	351	362	375	397	413
SUBTOTAL	3,396	3,525	3,736	4,087	4,426	4,775
OCEANIA						
AUSTRALIA	360	365	377	383	396	410
SUBTOTAL	360	365	377	383	396	410
TOTAL	23,380	24,252	25,635	27,182	28,205	29,297

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	586	579	613	625	642	650
MEXICO	540	633	694	845	1,009	1,094
UNITED STATES	6,908	7,443	7,847	8,309	8,797	9,135
SUBTOTAL	8,034	8,655	9,154	9,779	10,448	10,879
SOUTH AMERICA						
ARGENTINA	343	309	301	422	530	522
BRAZIL	1,711	1,840	2,056	2,306	2,495	2,790
VENEZUELA	370	252	202	290	301	315
SUBTOTAL	2,424	2,401	2,559	3,018	3,326	3,627
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	148	134	126	127	130	134
DENMARK	49	48	48	50	50	50
FRANCE	571	620	644	633	630	630
GERMANY	499	526	544	566	590	605
GREECE	136	138	139	139	140	143
IRELAND	44	45	45	45	45	45
ITALY	606	631	650	636	643	643
NETHERLANDS	175	182	194	199	207	215
PORTUGAL	171	181	184	195	200	206
SPAIN	793	823	817	851	852	857
UNITED KINGDOM	845	825	876	994	1,043	1,047
SUBTOTAL	4,037	4,153	4,267	4,435	4,530	4,575
OTHER WESTERN EUROPE						
AUSTRIA	63	62	62	64	65	65
FINLAND	24	27	28	31	33	34
SUBTOTAL	87	89	90	95	98	99
EASTERN EUROPE						
CZECHOSLOVAKIA	154	157	155	155	158	162
ROMANIA	212	211	435	424	338	320
HUNGARY	220	218	210	160	160	165
POLAND	208	215	179	182	187	205
FORMER YUGOSLAVIA	248	244	236	190	174	180
SUBTOTAL	1,042	1,045	1,215	1,111	1,017	1,032
FSU-12	1,837	1,907	1,873	1,804	1,677	1,600
BALTIC STATES	42	44	45	45	43	43
SUBTOTAL	1,879	1,951	1,918	1,849	1,720	1,643
MIDDLE EAST						
ISRAEL	105	104	110	121	125	128
SAUDI ARABIA	439	420	442	495	534	554
TURKEY	148	175	259	274	320	325
SUBTOTAL	692	699	811	890	979	1,007
AFRICA						
EGYPT	254	215	187	172	152	165
SO. AFRICA, REP OF	500	470	496	508	494	508
SUBTOTAL	754	685	683	680	646	673
ASIA						
CHINA (PRC)	1,400	1,500	1,600	1,734	2,000	2,300
HONG KONG	124	148	157	172	209	211
JAPAN	1,607	1,626	1,632	1,634	1,637	1,670
SINGAPORE	84	85	81	91	88	88
TAIWAN	316	351	362	375	397	413
THAILAND	402	430	436	466	520	540
SUBTOTAL	3,933	4,140	4,268	4,472	4,851	5,222
OCEANIA						
AUSTRALIA	353	365	375	381	392	406
SUBTOTAL	353	365	375	381	392	406
TOTAL	23,235	24,183	25,340	26,710	28,007	29,163

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	1	1	1	5	1	3
UNITED STATES	347	369	518	572	658	674
SUBTOTAL	**348**	**370**	**519**	**577**	**659**	**677**
SOUTH AMERICA						
ARGENTINA	0	0	4	1	1	1
BRAZIL	236	244	300	322	370	340
VENEZUELA	0	0	22	22	25	27
SUBTOTAL	**236**	**244**	**326**	**345**	**396**	**368**
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	29	35	48	62	65	68
DENMARK	55	60	70	76	78	78
FRANCE	295	349	358	401	415	425
GERMANY	20	27	45	24	26	40
IRELAND	3	3	3	3	3	3
ITALY	5	7	10	10	9	9
NETHERLANDS	253	265	286	317	338	355
SPAIN	9	5	3	7	3	3
UNITED KINGDOM	24	26	27	35	35	35
SUBTOTAL	**693**	**777**	**850**	**935**	**972**	**1,016**
EX INTRA-EC TRADE	**306**	**371**	**389**	**387**	**400**	**413**
EASTERN EUROPE						
CZECHOSLOVAKIA	15	10	10	6	7	7
ROMANIA	95	85	0	0	10	5
HUNGARY	180	96	95	74	85	70
FORMER YUGOSLAVIA	12	15	11	7	4	2
SUBTOTAL	**302**	**206**	**116**	**87**	**106**	**84**
MIDDLE EAST						
ISRAEL	8	14	11	15	14	14
SAUDI ARABIA	2	2	2	2	4	5
TURKEY	2	2	1	1	1	1
SUBTOTAL	**12**	**18**	**14**	**18**	**19**	**20**
AFRICA						
SO. AFRICA, REP OF	11	11	1	1	6	2
SUBTOTAL	11	11	1	1	6	2
ASIA						
CHINA (PRC)	74	83	86	93	115	130
HONG KONG	27	47	72	94	98	100
SINGAPORE	13	10	11	11	10	13
THAILAND	96	108	139	164	160	180
SUBTOTAL	**210**	**248**	**308**	**362**	**383**	**423**
OCEANIA						
AUSTRALIA	2	1	2	2	4	4
SUBTOTAL	2	1	2	2	4	4
TOTAL	1,803	1,864	2,135	2,326	2,539	2,592
TOTAL (EXCL INTRA-EC TRADE)	1,416	1,458	1,674	1,778	1,967	1,989

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICE

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	41	39	49	51	61	65
MEXICO	50	45	39	60	74	74
SUBTOTAL	91	84	88	111	135	139
SOUTH AMERICA						
ARGENTINA	1	1	0	2	25	20
SUBTOTAL	1	1	0	2	25	20
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	27	25	27	33	35	37
DENMARK	1	1	1	2	2	2
FRANCE	25	50	48	45	45	45
GERMANY	192	205	240	281	290	295
GREECE	5	6	9	8	9	9
IRELAND	8	8	8	8	8	8
ITALY	18	30	28	31	32	32
NETHERLANDS	32	37	50	65	75	90
PORTUGAL	2	3	5	2	1	0
SPAIN	45	56	54	48	55	60
UNITED KINGDOM	70	72	111	112	145	135
SUBTOTAL	425	493	581	635	697	713
EX INTRA EC-TRADE	60	88	128	111	135	132
OTHER WESTERN EUROPE						
AUSTRIA	3	3	2	2	2	2
SUBTOTAL	3	3	2	2	2	2
FSU-12	167	199	200	120	78	60
SUBTOTAL	167	199	200	120	78	60
EASTERN EUROPE						
CZECHOSLOVAKIA	5	5	5	5	5	0
ROMANIA	10	5	5	20	45	45
FORMER YUGOSLAVIA	0	0	0	2	1	1
SUBTOTAL	15	10	10	27	51	46
MIDDLE EAST						
SAUDI ARABIA	193	194	209	244	249	253
SUBTOTAL	193	194	209	244	249	253
AFRICA						
EGYPT	25	20	2	2	2	10
SO. AFRICA, REP OF	4	1	3	2	1	0
SUBTOTAL	29	21	5	4	3	10
ASIA						
CHINA (PRC)	22	49	65	82	105	115
HONG KONG	127	172	208	246	289	292
JAPAN	261	271	291	347	395	400
SINGAPORE	45	47	50	51	55	57
SUBTOTAL	455	539	614	726	844	864
TOTAL	1,379	1,544	1,709	1,871	2,084	2,107
TOTAL (EXCL INTRA-EC TRADE)	1,014	1,139	1,256	1,347	1,522	1,526

SOURCE: COUNSELLOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	119	120	129	131	132	134
MEXICO	14	9	8	12	13	14
UNITED STATES	1,760	1,876	2,048	2,088	2,161	2,197
SUBTOTAL	1,893	2,005	2,185	2,231	2,306	2,345
SOUTH AMERICA						
BRAZIL	50	55	60	63	60	65
SUBTOTAL	50	55	60	63	60	65
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	6	6	4	4	4	4
DENMARK	2	3	3	4	5	6
FRANCE	332	387	432	487	520	540
GERMANY	96	118	145	149	165	178
GREECE	3	3	3	3	3	3
IRELAND	16	16	16	16	16	16
ITALY	250	257	279	273	273	273
NETHERLANDS	27	27	30	32	32	33
PORTUGAL	28	29	30	33	29	32
SPAIN	21	21	29	27	28	30
UNITED KINGDOM	210	230	223	242	240	245
SUBTOTAL	991	1,097	1,194	1,270	1,315	1,360
EASTERN EUROPE						
POLAND	15	15	15	15	15	15
FOR. YUGOSLAVIA	15	12	11	10	7	6
SUBTOTAL	30	27	26	25	22	21
FSU-12	115	120	90	75	65	60
SUBTOTAL	115	120	90	75	65	60
MIDDLE EAST						
ISRAEL	55	56	52	60	62	64
SUBTOTAL	55	56	52	60	62	64
TOTAL	3,134	3,360	3,607	3,724	3,830	3,915

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	117	119	125	126	136	136
MEXICO	18	14	15	41	55	68
UNITED STATES	1,744	1,863	1,991	2,060	2,070	2,129
SUBTOTAL	1,879	1,996	2,131	2,227	2,261	2,333
SOUTH AMERICA						
BRAZIL	46	51	55	58	55	60
SUBTOTAL	46	51	55	58	55	60
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	17	18	19	22	22	22
DENMARK	2	4	6	7	8	9
FRANCE	268	301	315	330	335	340
GERMANY	145	172	210	242	265	287
GREECE	3	4	4	4	5	6
IRELAND	14	14	14	14	14	14
ITALY	251	256	272	265	268	268
NETHERLANDS	17	20	27	30	31	33
PORTUGAL	28	29	30	33	31	32
SPAIN	25	31	44	39	43	46
UNITED KINGDOM	189	209	215	224	219	227
SUBTOTAL	959	1,058	1,156	1,210	1,241	1,284
EASTERN EUROPE						
POLAND	15	15	13	16	16	15
FOR. YUGOSLAVIA	15	12	12	11	8	9
SUBTOTAL	30	27	25	27	24	24
FSU-12	117	120	92	75	72	60
SUBTOTAL	117	120	92	75	72	60
MIDDLE EAST						
ISRAEL	45	44	44	55	56	57
SUBTOTAL	45	44	44	55	56	57
TOTAL	3,076	3,296	3,503	3,652	3,709	3,818

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	5	6	5	7	4	5
UNITED STATES	23	19	24	47	75	79
SUBTOTAL	28	25	29	54	79	84
SOUTH AMERICA						
BRAZIL	4	4	5	5	5	5
SUBTOTAL	4	4	5	5	5	5
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	4	5	7	7	7	8
DENMARK	1	1	0	1	1	1
FRANCE	69	95	123	150	190	210
GERMANY	11	11	14	14	15	17
GREECE	11	11	13	14	0	0
IRELAND	3	3	3	3	3	3
ITALY	7	12	17	19	17	17
NETHERLANDS	25	25	28	32	30	31
SPAIN	1	0	0	1	1	1
UNITED KINGDOM	30	33	29	39	43	41
SUBTOTAL	162	196	234	280	307	329
EX INTRA-EC TRADE	51	62	82	92	100	107
MIDDLE EAST						
ISRAEL	12	10	8	7	6	6
SUBTOTAL	12	10	8	7	6	6
TOTAL	206	235	276	346	397	424
TOTAL (EXCL INTRA-EC TRADE)	95	101	124	158	190	202

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	2	3	4	5	5	5
MEXICO	4	5	7	29	42	54
SUBTOTAL	6	8	11	34	47	59
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	15	17	22	25	25	26
DENMARK	1	2	3	4	4	4
FRANCE	5	9	6	5	5	5
GERMANY	60	65	79	105	115	126
GREECE	0	1	1	2	2	3
IRELAND	1	1	1	1	1	1
ITALY	8	11	10	11	12	12
NETHERLANDS	14	17	25	29	30	31
PORTUGAL	0	0	0	2	2	0
SPAIN	5	10	15	13	16	17
UNITED KINGDOM	7	10	21	23	20	20
SUBTOTAL	116	143	183	220	232	245
EX INTRA-EC TRADE	20	25	27	25	33	28
FSU-12	2	0	2	0	2	2
SUBTOTAL	2	0	2	0	2	2
ASIA						
SOUTH KOREA, REP OF	0	0	6	11	15	17
SUBTOTAL	0	0	6	11	15	17
TOTAL	124	151	202	265	296	323
TOTAL (EXCL INTRA-EC TRADE)	28	33	46	70	97	106

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG PRODUCTION

SELECTED COUNTRIES
(MILLION PIECES)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	5,721	5,719	5,661	5,666	5,680	5,685
MEXICO	17,859	17,950	18,040	19,840	19,650	20,140
UNITED STATES	69,410	67,178	67,984	69,094	70,513	70,260
SUBTOTAL	92,990	90,847	91,685	94,600	95,843	96,085
SOUTH AMERICA						
ARGENTINA	3,300	3,350	3,900	4,550	4,600	4,730
BRAZIL	14,850	12,174	13,454	13,655	14,200	14,750
VENEZUELA	2,700	2,600	1,146	1,928	2,223	2,400
SUBTOTAL	20,850	18,124	18,500	20,133	21,023	21,880
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	2,830	2,724	2,941	3,134	3,165	3,197
DENMARK	1,366	1,410	1,409	1,435	1,470	1,495
FRANCE	15,300	15,050	14,629	15,300	15,500	15,700
GERMANY	17,960	17,794	16,800	15,525	15,750	15,600
GREECE	2,485	2,507	2,566	2,514	2,500	2,550
IRELAND	640	640	640	640	640	640
ITALY	11,234	11,223	11,454	11,568	11,570	11,570
NETHERLANDS	10,761	10,660	10,801	10,762	10,300	9,800
PORTUGAL	1,633	1,520	1,590	1,671	1,750	1,700
SPAIN	10,856	10,140	10,659	10,184	10,300	10,400
UNITED KINGDOM	11,736	10,547	10,658	11,006	11,416	11,420
SUBTOTAL	86,801	84,215	84,147	83,739	84,361	84,072
OTHER WESTERN EUROPE						
AUSTRIA	1,757	1,695	1,664	1,691	1,696	1,700
FINLAND	1,304	1,288	1,232	1,077	1,045	990
SWITZERLAND	708	693	635	628	628	631
SUBTOTAL	3,769	3,676	3,531	3,396	3,369	3,321
EASTERN EUROPE						
CZECHOSLOVAKIA	5,596	5,628	5,665	5,325	5,320	5,320
BULGARIA	2,850	2,850	2,850	2,850	2,850	2,850
ROMANIA	7,650	7,600	7,100	6,900	7,100	7,200
HUNGARY	4,695	4,250	4,300	4,200	4,100	4,100
POLAND	8,220	8,200	7,649	6,500	7,000	7,500
FORMER YUGOSLAVIA	4,972	4,700	4,566	4,420	4,290	4,300
SUBTOTAL	33,983	33,228	32,130	30,195	30,660	31,270
FSU-12	82,204	82,033	79,086	76,675	68,000	65,250
BALTIC STATES	2,846	2,821	2,639	2,560	2,370	2,280
SUBTOTAL	85,050	84,854	81,725	79,235	70,370	67,530
MIDDLE EAST						
ISRAEL	1,902	1,898	1,843	1,797	1,873	1,841
SAUDI ARABIA	2,765	2,800	2,900	2,863	2,850	2,915
TURKEY	6,200	7,200	7,500	7,300	8,000	8,100
SUBTOTAL	10,867	11,898	12,243	11,960	12,723	12,856
AFRICA						
ALGERIA	3,200	3,400	3,470	3,600	3,650	3,650
EGYPT	2,840	3,000	3,200	2,900	2,950	3,000
SO. AFRICA, REP OF	3,723	4,012	4,164	4,260	4,315	4,355
SUBTOTAL	9,763	10,412	10,834	10,760	10,915	11,005
ASIA						
CHINA (PRC)	139,100	140,900	158,920	185,000	195,000	205,000
HONG KONG	40	34	34	33	33	32
JAPAN	40,137	40,383	39,850	41,700	42,280	42,200
KOREA, REPUBLIC OF	7,204	6,919	7,145	7,770	8,000	8,500
TAIWAN	4,400	4,450	4,500	4,500	4,550	4,800
SUBTOTAL	190,881	192,686	210,449	239,003	249,863	260,532
OCEANIA						
AUSTRALIA	3,238	3,286	3,468	3,540	3,710	3,784
SUBTOTAL	3,238	3,286	3,468	3,540	3,710	3,784
TOTAL	538,192	533,226	548,712	576,561	582,837	592,335

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TABLE EGG CONSUMPTION

SELECTED COUNTRIES
(IN MILLION PIECES)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	4,630	4,435	4,300	4,280	4,220	4,200
MEXICO	16,490	16,233	16,281	17,839	17,674	18,141
UNITED STATES	49,659	47,708	46,709	45,881	45,951	44,480
SUBTOTAL	70,779	68,376	67,290	68,000	67,845	66,821
SOUTH AMERICA						
ARGENTINA	2,985	3,050	3,100	3,750	3,800	3,700
BRAZIL	14,850	12,174	13,450	13,635	14,178	14,725
VENEZUELA	2,321	2,325	1,030	1,829	2,131	2,290
SUBTOTAL	20,156	17,549	17,580	19,214	20,109	20,715
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	2,277	2,000	2,174	2,276	2,279	2,252
DENMARK	1,142	1,128	982	1,011	1,050	1,090
FRANCE	14,600	14,626	13,759	14,200	14,300	14,300
GERMANY	21,325	20,747	20,270	19,457	19,496	19,418
GREECE	2,380	2,400	2,400	2,450	2,430	2,430
IRELAND	798	798	798	798	798	798
ITALY	10,904	9,714	9,613	9,732	9,740	9,740
NETHERLANDS	2,798	2,704	2,644	2,571	2,500	2,450
PORTUGAL	1,400	1,329	1,364	1,391	1,452	1,432
SPAIN	10,043	9,657	10,144	9,474	9,717	9,922
UNITED KINGDOM	11,598	9,889	10,135	9,084	9,493	9,500
SUBTOTAL	79,265	74,992	74,283	72,444	73,255	73,332
OTHER WESTERN EUROPE						
AUSTRIA	1,734	1,674	1,649	1,649	1,645	1,640
FINLAND	910	881	832	800	800	800
SWEDEN	1,075	1,189	1,147	1,125	1,128	1,129
SUBTOTAL	3,719	3,744	3,628	3,574	3,573	3,569
EASTERN EUROPE						
CZECHOSLOVAKIA	5,310	5,393	5,345	5,211	5,180	5,170
BULGARIA	2,250	2,250	2,250	2,250	2,250	2,200
ROMANIA	5,665	5,620	5,490	6,950	7,050	7,202
HUNGARY	3,070	3,025	3,000	2,900	2,900	2,900
POLAND	7,250	7,459	6,956	6,277	6,485	6,760
FORMER YUGOSLAVIA	4,275	3,975	3,991	4,397	4,301	4,282
SUBTOTAL	27,820	27,722	27,032	27,985	28,166	28,514
FSU-12	74,371	74,212	71,266	68,785	60,073	57,319
BALTIC STATES	2,090	2,201	2,046	2,068	1,739	1,550
SUBTOTAL	76,461	76,413	73,312	70,853	61,812	58,869
MIDDLE EAST						
ISRAEL	1,600	1,520	1,551	1,730	1,871	1,736
SAUDI ARABIA	1,681	2,400	2,470	2,282	2,289	2,332
TURKEY	5,496	5,637	6,570	7,300	7,500	7,600
SUBTOTAL	8,777	9,557	10,591	11,312	11,660	11,668
AFRICA						
ALGERIA	2,600	2,820	2,900	3,000	3,050	3,000
EGYPT	2,649	3,000	2,800	2,550	2,595	2,640
SO. AFRICA, REP OF	2,989	3,227	3,488	3,533	3,599	3,642
SUBTOTAL	8,238	9,047	9,188	9,083	9,244	9,282
ASIA						
CHINA (PRC)	135,130	137,100	154,180	173,377	182,370	191,780
HONG KONG	1,482	1,364	1,401	1,466	1,545	1,605
JAPAN	29,750	30,000	29,100	32,136	32,578	32,530
KOREA, REPUBLIC OF	6,992	6,701	6,810	7,370	7,600	8,080
TAIWAN	3,784	3,834	3,840	3,845	3,890	3,900
SUBTOTAL	177,138	178,999	195,331	218,194	227,983	237,895
OCEANIA						
AUSTRALIA	2,747	2,794	3,017	3,097	3,230	3,290
SUBTOTAL	2,747	2,794	3,017	3,097	3,230	3,290
TOTAL	475,100	469,193	481,252	503,756	506,877	513,955

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG EXPORTS

SELECTED COUNTRIES
(MILLION PIECES)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	264	261	274	267	305	302
MEXICO	0	0	0	0	0	0
UNITED STATES	1,702	1,099	1,206	1,852	1,862	1,872
SUBTOTAL	1,966	1,360	1,480	2,119	2,167	2,174
SOUTH AMERICA						
BRAZIL	0	2	4	20	22	25
SUBTOTAL	0	2	4	20	22	25
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	1,377	1,712	1,687	1,714	1,751	1,820
DENMARK	107	143	197	178	202	202
FRANCE	514	571	893	1,048	1,200	1,200
GERMANY	1,204	1,537	1,880	1,300	1,350	1,300
GREECE	5	0	6	20	15	16
IRELAND	6	6	6	6	6	6
ITALY	14	50	56	29	28	28
NETHERLANDS	7,774	7,980	8,248	8,373	7,900	7,400
PORTUGAL	13	22	22	66	70	46
SPAIN	30	25	53	112	53	43
UNITED KINGDOM	286	410	620	243	315	340
SUBTOTAL	11,330	12,456	13,668	13,089	12,890	12,401
EX INTRA EC-TRADE	2,266	2,947	2,315	2,197	2,317	1,986
OTHER WESTERN EUROPE						
FINLAND	316	326	329	208	173	115
SUBTOTAL	316	326	329	208	173	115
FSU-12	0	20	20	10	5	1
SUBTOTAL	0	20	20	10	5	1
EASTERN EUROPE						
CZECHOSLOVAKIA	85	35	120	148	150	150
BULGARIA	310	310	310	310	310	300
ROMANIA	525	535	0	0	0	0
POLAND	30	15	107	10	10	20
HUNGARY	160	125	100	95	95	95
FORMER YUGOSLAVIA	300	10	6	70	8	5
SUBTOTAL	1,410	1,030	643	633	573	570
MIDDLE EAST						
ISRAEL	123	145	46	67	105	105
SAUDI ARABIA	168	166	203	206	213	221
TURKEY	201	1,214	47	16	22	22
SUBTOTAL	492	1,525	296	289	340	348
AFRICA						
SO. AFRICA, REP OF	0	0	0	111	92	86
SUBTOTAL	0	0	0	111	92	86
ASIA						
CHINA (PRC)	1,145	814	786	788	780	770
HONG KONG	47	55	45	35	36	41
JAPAN	2	4	2	0	0	0
TAIWAN	26	26	0	0	0	0
SUBTOTAL	1,220	899	833	934	908	897
OCEANIA						
AUSTRALIA	99	100	38	13	41	44
SUBTOTAL	99	100	38	13	41	44
TOTAL	16,833	17,718	17,311	17,315	17,119	16,575
TOTAL (EXCL INTRA-EC TRADE)	7,769	8,209	5,958	6,423	6,546	6,160

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG IMPORTS

SELECTED COUNTRIES
(MILLION PIECES)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	409	409	430	404	405	390
MEXICO	202	164	136	90	110	92
UNITED STATES	63	302	109	28	49	48
SUBTOTAL	674	573	566	494	515	482
SOUTH AMERICA						
ARGENTINA	10	5	5	25	30	16
VENEZUELA	5	3	0	46	75	90
SUBTOTAL	15	8	5	71	105	106
EUROPEAN COMMUNITY						
BELGIUM–LUXEM.	999	1,153	1,083	1,026	1,040	1,055
DENMARK	138	108	152	155	170	170
FRANCE	1,162	1,327	1,253	1,238	1,220	1,220
GERMANY	5,609	5,358	5,700	5,763	5,760	5,760
GREECE	50	20	33	41	41	44
IRELAND	210	210	210	210	210	210
ITALY	944	1,133	919	936	950	950
NETHERLANDS	407	622	746	857	760	700
PORTUGAL	1	17	12	8	6	6
SPAIN	138	471	371	235	300	400
UNITED KINGDOM	674	824	1,415	967	910	912
SUBTOTAL	10,332	11,243	11,894	11,436	11,367	11,427
EX INTRA EC–TRADE	625	649	676	715	561	578
OTHER WESTERN EUROPE						
AUSTRIA	115	350	413	256	340	389
SWITZERLAND	838	686	735	770	778	778
SUBTOTAL	953	1,036	1,148	1,026	1,118	1,167
FSU–12	167	199	200	120	78	70
SUBTOTAL	167	199	200	120	78	70
EASTERN EUROPE						
FORMER YUGOSLAVIA	50	16	86	25	9	7
POLAND	0	0	60	514	215	65
SUBTOTAL	50	16	146	539	224	72
MIDDLE EAST						
SAUDI ARABIA	51	29	29	56	57	60
TURKEY	7	1	5	11	5	5
SUBTOTAL	58	30	34	67	62	65
AFRICA						
ALGERIA	98	119	120	130	130	130
EGYPT	69	20	0	0	0	0
SUBTOTAL	167	139	120	130	130	130
ASIA						
CHINA (PRC)	4	23	53	50	50	50
HONG KONG	1,709	1,605	1,631	1,690	1,780	1,850
JAPAN	746	880	792	1,116	835	960
SUBTOTAL	2,459	2,508	2,476	2,856	2,665	2,860
TOTAL	14,875	15,752	16,589	16,739	16,264	16,379
TOTAL (EXCL INTRA–EC TRADE)	5,168	5,158	5,371	6,018	5,458	5,530

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGGS: TOTAL UTILIZATION

SELECTED COUNTRIES
(MILLION PIECES)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	5,848	5,826	5,805	5,805	5,790	5,768
MEXICO	18,113	18,175	19,929	19,930	19,760	20,232
UNITED STATES	67,762	66,435	66,875	67,254	68,688	68,460
SUBTOTAL	91,723	90,436	92,609	92,989	94,238	94,460
SOUTH AMERICA						
ARGENTINA	3,310	3,355	3,437	4,050	4,100	4,000
BRAZIL	14,850	12,174	13,450	13,635	14,178	14,725
VENEZUELA	2,680	2,606	1,147	1,974	2,298	2,490
SUBTOTAL	20,840	18,135	18,034	19,659	20,576	21,215
EUROPEAN COMMUNITY						
BELGIUM–LUXEMBOUR	2,452	2,165	2,337	2,446	2,454	2,432
DENMARK	1,266	1,260	1,135	1,161	1,199	1,252
FRANCE	15,580	15,687	14,959	15,415	15,500	15,500
GERMANY	22,373	21,510	21,020	20,114	20,160	20,060
GREECE	2,490	2,515	2,490	2,550	2,525	2,525
IRELAND	841	841	841	841	841	841
ITALY	11,504	10,356	10,337	10,455	10,463	10,463
NETHERLANDS	3,394	3,302	3,299	3,248	3,160	3,100
PORTUGAL	1,616	1,510	1,576	1,608	1,680	1,656
SPAIN	10,964	10,586	10,977	10,307	10,547	10,757
UNITED KINGDOM	12,488	10,689	11,247	10,299	10,493	10,472
SUBTOTAL	84,968	80,421	80,218	78,444	79,022	79,058
OTHER WESTERN EUROPE						
AUSTRIA	1,811	1,751	1,728	1,947	2,036	2,089
FINLAND	932	891	846	812	812	810
SWITZERLAND	1,551	1,379	1,368	1,402	1,404	1,408
SUBTOTAL	4,294	4,021	3,942	4,161	4,252	4,307
EASTERN EUROPE						
CZECHOSLOVAKIA	5,511	5,593	5,545	5,359	5,330	5,320
HUNGARY	4,570	4,125	4,200	4,119	4,005	4,100
POLAND	7,721	7,930	7,352	6,697	6,895	7,195
FORMER YUGOSLAVIA	4,625	4,555	4,576	4,467	4,309	4,312
SUBTOTAL	22,427	22,203	21,673	20,642	20,539	20,927
FSU–12	82,371	82,212	79,266	76,785	68,073	65,319
BALTIC STATES	2,846	2,821	2,639	2,068	1,739	1,550
SUBTOTAL	85,217	85,033	81,905	78,853	69,812	66,869
MIDDLE EAST						
ISRAEL	1,776	1,751	1,806	1,797	1,851	1,841
SAUDI ARABIA	2,656	2,652	2,750	2,667	2,679	2,744
TURKEY	5,856	6,037	7,058	7,845	8,100	8,200
SUBTOTAL	10,288	10,440	11,614	12,309	12,630	12,785
AFRICA						
ALGERIA	3,297	3,519	3,600	3,720	3,770	3,800
EGYPT	2,889	3,000	3,177	2,880	2,930	2,980
SO. AFRICA, REP OF	3,635	3,910	4,047	4,121	4,194	4,242
SUBTOTAL	9,821	10,429	10,824	10,721	10,894	11,022
ASIA						
CHINA (PRC)	137,959	140,109	158,187	184,262	194,270	204,280
HONG KONG	1,509	1,385	1,420	1,488	1,566	1,626
JAPAN	31,210	31,460	30,465	33,696	34,158	34,090
KOREA, REPUBLIC OF	7,202	6,921	7,140	7,770	8,000	8,500
TAIWAN	4,004	4,054	3,840	3,845	3,890	3,900
SUBTOTAL	181,884	183,929	201,052	231,061	241,884	252,396
OCEANIA						
AUSTRALIA	3,147	3,186	3,430	3,527	3,673	3,742
SUBTOTAL	3,147	3,186	3,430	3,527	3,673	3,742
TOTAL	514,609	508,233	525,301	552,366	557,520	566,781

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TOTAL POULTRY MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	27.40	26.90	27.72	27.82	28.44	28.38
MEXICO	7.90	8.10	8.39	10.24	11.93	12.81
UNITED STATES	37.30	39.50	40.13	41.84	43.52	44.90
SOUTH AMERICA						
ARGENTINA	13.60	13.60	10.29	13.43	16.72	16.28
BRAZIL	12.20	12.90	13.84	15.22	16.12	17.70
VENEZUELA	20.40	13.50	10.31	14.37	14.56	14.91
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	16.80	15.70	15.27	15.32	15.56	16.00
DENMARK	11.50	11.70	11.67	12.62	12.97	13.21
FRANCE	19.50	21.20	21.42	21.77	21.91	21.96
GERMANY	10.80	11.10	10.99	12.19	12.78	13.21
GREECE	15.40	15.70	16.44	16.42	16.59	16.97
IRELAND	17.50	17.80	22.80	23.05	23.29	23.51
ITALY	17.70	18.30	18.78	18.50	18.63	18.60
NETHERLANDS	15.10	15.70	17.40	17.77	18.53	19.09
PORTUGAL	20.10	20.40	20.84	22.19	22.30	22.70
SPAIN	22.60	23.00	23.23	24.11	24.08	24.13
UNITED KINGDOM	20.70	19.30	20.12	22.30	22.98	23.17
OTHER WESTERN EUROPE						
AUSTRIA	11.90	12.10	12.05	12.93	13.35	13.52
FINLAND	5.70	6.30	6.63	7.21	7.59	7.97
EASTERN EUROPE						
CZECHOSLOVAKIA	12.90	13.50	13.15	13.25	13.35	13.64
HUNGARY	23.70	22.90	22.67	20.30	20.32	22.28
POLAND	8.50	8.90	8.16	8.31	8.54	8.93
FORMER YUGOSLAVIA	13.50	13.20	12.30	10.03	9.06	9.22
FSU-12	11.80	12.30	12.30	11.40	10.70	10.50
MIDDLE EAST						
ISRAEL	37.60	33.70	40.67	38.56	37.91	37.41
SAUDI ARABIA	31.30	27.10	27.35	30.66	32.02	32.02
TURKEY	4.30	4.60	4.69	4.85	5.53	5.50
AFRICA						
EGYPT	6.20	5.40	4.40	4.12	3.76	3.90
SO. AFRICA, REP OF	15.60	14.60	14.37	13.92	13.15	13.18
ASIA						
CHINA (PRC)	2.50	2.60	2.81	3.40	3.80	4.32
HONG KONG	28.80	32.60	33.52	36.56	40.41	40.86
JAPAN	14.30	14.40	14.25	14.23	14.22	14.28
SINGAPORE	37.10	36.30	34.56	36.64	35.46	35.03
TAIWAN	21.00	22.80	23.05	22.99	23.71	23.94
THAILAND	7.80	8.20	8.05	8.55	9.46	9.67
OCEANIA						
AUSTRALIA	24.60	24.60	24.43	24.42	24.81	25.30

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA BROILER MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	22.90	22.30	23.03	23.15	23.47	23.47
MEXICO	6.60	7.50	7.86	9.35	10.92	11.59
UNITED STATES	28.70	30.60	31.34	32.91	34.56	35.61
SOUTH AMERICA						
ARGENTINA	12.60	12.60	9.36	12.97	16.11	15.68
BRAZIL	11.90	12.50	13.48	14.84	15.77	17.33
VENEZUELA	20.30	13.50	10.26	14.37	14.56	14.86
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	14.50	13.10	12.18	12.24	12.49	12.84
DENMARK	9.60	9.40	9.34	9.70	9.68	9.57
FRANCE	10.30	11.10	11.35	11.10	11.00	10.94
GERMANY	6.40	6.70	6.86	7.08	7.34	7.49
GREECE	13.60	13.80	13.85	13.83	13.91	14.19
IRELAND	12.40	12.70	12.83	12.81	12.78	12.75
ITALY	10.60	11.00	11.27	11.00	11.10	11.08
NETHERLANDS	11.90	12.30	12.99	13.24	13.70	14.15
PORTUGAL	16.70	17.60	17.75	18.73	19.14	19.65
SPAIN	20.40	21.10	20.97	21.80	21.78	21.86
UNITED KINGDOM	15.90	14.50	15.26	17.25	18.05	18.00
OTHER WESTERN EUROPE						
AUSTRIA	8.30	8.20	8.03	8.19	8.26	8.21
FINLAND	4.90	5.50	5.63	6.21	6.59	6.78
EASTERN EUROPE						
CZECHOSLOVAKIA	9.90	10.10	9.90	9.88	10.05	10.28
HUNGARY	20.70	20.60	20.26	15.46	15.48	15.98
POLAND	5.50	5.70	4.70	4.76	4.87	5.32
FORMER YUGOSLAVIA	10.60	10.40	9.91	7.94	7.23	7.45
FSU-12	7.00	7.10	7.20	6.50	5.90	5.80
MIDDLE EAST						
ISRAEL	25.00	24.30	25.56	26.66	26.33	26.02
SAUDI ARABIA	29.50	26.90	27.16	29.99	31.32	31.45
TURKEY	2.80	3.20	4.53	4.69	5.37	5.34
AFRICA						
EGYPT	5.00	4.10	3.48	3.12	2.70	2.86
SO. AFRICA, REP OF	13.70	12.50	12.54	12.51	11.85	11.87
ASIA						
CHINA (PRC)	1.45	1.49	1.50	1.51	1.71	1.94
HONG KONG	22.20	26.20	26.99	29.38	35.49	35.63
JAPAN	12.60	13.20	13.20	13.19	13.30	13.45
SINGAPORE	32.20	32.10	32.50	33.01	31.52	31.14
TAIWAN	14.60	15.90	17.71	18.15	19.01	19.58
THAILAND	7.60	8.00	7.79	8.20	9.02	9.24
OCEANIA						
AUSTRALIA	21.70	22.20	21.97	21.99	22.30	22.77

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TURKEY MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	4.60	4.60	4.70	4.67	4.97	4.91
MEXICO	0.20	0.20	0.17	0.45	0.60	0.72
UNITED STATES	7.50	7.80	7.95	8.16	8.13	8.30
SOUTH AMERICA						
BRAZIL	0.30	0.30	0.36	0.37	0.35	0.37
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	1.70	1.80	1.84	2.12	2.11	2.11
DENMARK	0.40	0.80	1.17	1.36	1.55	1.72
FRANCE	4.80	5.40	5.55	5.79	5.85	5.90
GERMANY	1.90	2.20	2.65	3.03	3.30	3.55
GREECE	0.30	0.40	0.40	0.40	0.50	0.60
IRELAND	4.00	4.00	3.99	3.98	3.98	3.97
ITALY	4.40	4.50	4.72	4.58	4.63	4.62
NETHERLANDS	1.20	1.40	1.81	2.00	2.05	2.17
PORTUGAL	2.70	2.80	2.89	3.17	2.97	3.05
SPAIN	0.60	0.80	1.13	1.00	1.10	1.17
UNITED KINGDOM	3.30	3.60	3.74	3.89	3.79	3.90
EASTERN EUROPE						
POLAND	0.40	0.40	0.34	0.34	0.34	0.34
FOR. YUGOSLAVIA	0.60	0.50	0.50	0.50	0.50	0.50
MIDDLE EAST						
ISRAEL	10.70	10.30	10.23	10.23	10.23	10.23

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TABLE EGG CONSUMPTION

SELECTED COUNTRIES
(IN PIECES)

	1988	1989	1990	1991	1992 PRELIM	1993 FORECAST
NORTH AMERICA						
CANADA	181	171	162	159	154	152
MEXICO	201	193	184	197	191	192
UNITED STATES	204	194	187	182	181	173
SOUTH AMERICA						
ARGENTINA	97	97	96	115	115	111
BRAZIL	103	83	88	88	90	91
VENEZUELA	127	124	52	91	103	108
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	222	195	210	219	219	216
DENMARK	223	220	191	196	203	209
FRANCE	262	262	243	249	250	248
GERMANY	265	253	255	243	243	240
GREECE	238	240	239	244	241	241
IRELAND	225	226	227	227	227	226
ITALY	190	169	167	168	168	168
NETHERLANDS	191	183	177	171	165	161
PORTUGAL	137	129	132	134	139	137
SPAIN	259	248	260	243	248	253
UNITED KINGDOM	172	173	177	158	164	163
OTHER WESTERN EUROPE						
AUSTRIA	229	220	214	211	209	207
FINLAND	185	178	167	160	160	159
EASTERN EUROPE						
CZECHOSLOVAKIA	341	346	341	332	329	328
HUNGARY	289	286	289	280	281	281
POLAND	193	198	183	164	169	175
FORMER YUGOSLAVIA	183	169	168	184	179	177
FSU-12	273	269	253	242	231	230
MIDDLE EAST						
ISRAEL	381	356	402	381	394	353
SAUDI ARABIA	113	154	152	138	134	132
TURKEY	104	104	115	125	126	125
AFRICA						
EGYPT	52	58	52	46	46	46
SO. AFRICA, REP OF	82	86	88	87	86	85
ASIA						
CHINA (PRC)	126	126	136	151	156	161
HONG KONG	265	242	241	250	262	271
JAPAN	244	245	235	259	262	260
OCEANIA						
AUSTRALIA	169	170	177	179	184	185

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

FAS Publications: Market Information For Agricultural Exporters

As an agricultural exporter, you need timely, reliable information on changing consumer preferences, needs of foreign buyers, and the supply and demand situation in countries around the world.

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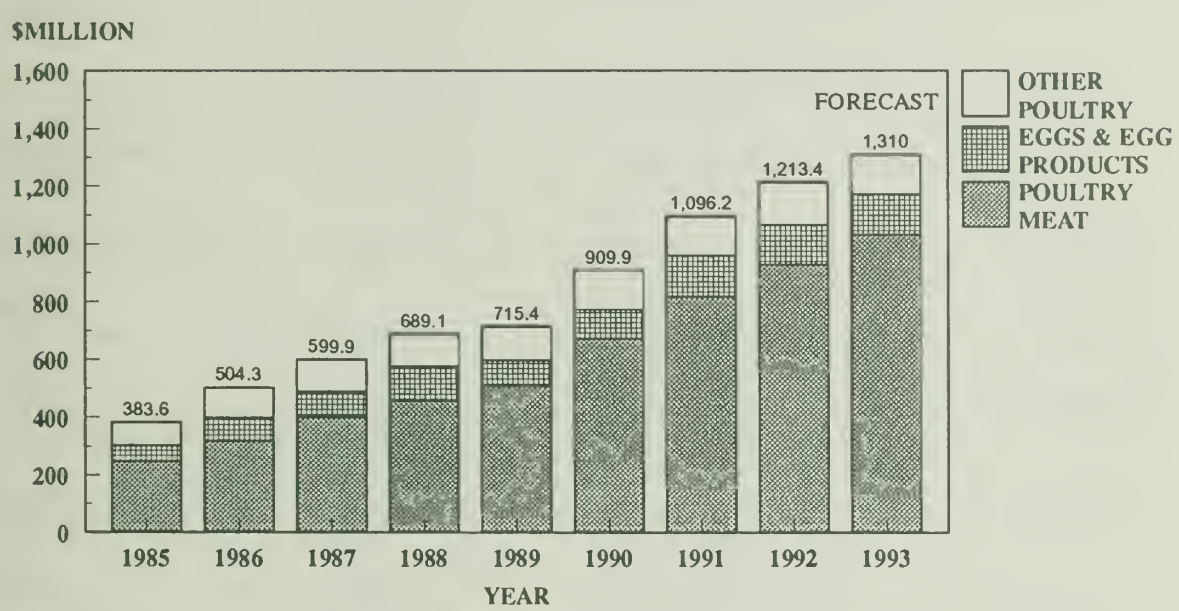

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INTRODUCTION TO WORLD POULTRY SITUATION REPORT

This publication presents revised data for 1992 and provides forecasts for 1993 and 1994 on world poultry production and distribution. Since the last World Poultry Situation (published August 1992), some countries have ceased reporting, and data for these countries no longer appear in the production and distribution tables. Namely, former Yugoslavia, former Czechoslovakia, Switzerland, India, and New Zealand have been eliminated from the tables.

The content of this publication is organized as follows: first, the U.S. poultry trade situation is described; second, world broiler production and distribution is outlined; third, the world turkey situation is discussed; and fourth, world egg production and distribution is described. Production, consumption, and trade tables conclude the report.

THE UNITED STATES MAINTAINS POSITION AS THE WORLD'S NUMBER 1 POULTRY EXPORTER DESPITE GROWING PROTECTIONISM IN A NUMBER OF EXPORT MARKETS

The value of U.S. poultry product exports set another record in 1992, increasing about 10 percent to $1.2 billion. A majority of the growth in U.S. poultry product exports was in the categories of broiler and turkey parts. In 1992, the quantity of U.S. broiler parts exports increased about 21 percent, while the volume of U.S. turkey part exports almost doubled.

Attractive U.S. prices, especially for leg quarters, drove the growth in U.S. broiler part exports in 1992. The top five markets for U.S. broiler cuts were Hong Kong (151,561 tons), Japan (117,879 tons), Mexico (63,392 tons), Canada (33,772 tons) and Poland (33,484 tons). Growing domestic demand within Hong Kong, combined with the thriving re-export of low-value broiler cuts to southern China, propelled Hong Kong into the top position among overseas U.S. broiler markets. Broiler parts exports to Japan, previously the number one market for U.S. broiler parts, declined somewhat due to sluggish demand and high stocks in Japan. U.S. exports of broiler parts to Mexico were driven by the overall growth and increased specialization of Mexico's retail food sector. Poland's desire for a relatively inexpensive source of meat protein led to the dramatic increase in U.S. broiler part exports to that market in 1992. In addition to these top five markets, the competitive prices of U.S. broiler parts

resulted in growth in sales to a number of other markets, including Romania, Guatemala, Jamaica, Iran, Colombia, and Venezuela.

Given the success of U.S. broiler exports in 1992, it is probably no coincidence that a number of governments took steps to curtail the flow of U.S. broiler meat entering their countries. Bowing to local pressure, a long list of countries either increased tariffs or artfully crafted new sanitary regulations to counter U.S. broiler imports. From South Africa to Poland to Central America, the popularity of competitively priced U.S. broiler meat generated demands from local producers to block U.S. broiler imports. A number of countries justified the new trade barriers by alleging that the United States was "dumping" leg quarters into their domestic markets. Other countries, meanwhile, wrongly accused the United States of providing subsidies for its broiler parts exports.

The competitive prices of U.S. dark meat parts stem from the structure of demand in the United States. U.S. consumers favor breast meat parts over legs and wings. Prevailing U.S. prices for light meat are consequently much greater than dark meat prices. Conversely, many segments of the world market prefer dark meat parts to light meat, an ideal match for U.S. producers. U.S. producers can sell light meat in the domestic arena and market the less expensive dark meat parts abroad. Neither export subsidies nor any form of direct government support is provided to U.S. broiler parts exports. On the contrary, it could be argued that U.S. domestic feed grains policy imposes a tax on broiler meat producers by artificially supporting grain prices.

Ironically, U.S. exports of whole broilers, the only U.S. poultry meat commodity that in some cases can qualify for export subsidies, actually declined in 1992. Under the Export Enhancement Program (EEP), U.S. exporters of whole broilers receive bonuses to compete with highly subsidized European Community (EC) whole broiler exports in the Gulf States, Saudi Arabia, Jordan, Egypt, and Singapore. In 1992, the U.S. exported only about 12,000 tons of whole broilers under the EEP, compared to 19,105 tons exported under the EEP in 1991. That 12,000 tons of subsidized exports comprised less than 2 percent of total U.S. broiler exports in 1992. Moreover, U.S. whole broiler exports to Canada and Mexico, two markets not targeted by the EEP, accounted for about 42 percent of U.S. whole broiler exports in 1992. Clearly, the success of U.S. broiler meat exports in 1992 was not due to the EEP, but rather due to the competitiveness of U.S. broiler parts prices on the world market.

Due to a growing tendency to use turkey meat as an important ingredient in further processed red meat products, U.S. exports of turkey meat grew substantially in 1992. Mexico was the dominant market for U.S. turkey meat in 1992, accounting for about 60 percent of total exports. Mexican meat processors are finding U.S. turkey meat a cost-effective alternative to using red meat in a variety of processed meat items. Similarly, U.S. turkey meat

exports to South Korea grew as a result of the increased use of turkey meat in South Korean specialty meat items. In 1992, U.S. turkey exports to South Korea nearly doubled and comprised about 10 percent of total turkey meat exports.

In 1992, table egg exports continued to be fueled by the EEP. Unlike the EEP for broilers, the EEP for eggs greatly benefits U.S. trade. Table egg exports were around 58 million dozen in 1992, about 12 percent above the 1991 export level. U.S. exports to Hong Kong, which receive EEP export bonuses, comprised about 50 percent of U.S. table egg exports in 1992. Egg exports to Mexico increased about 70 percent with the aid of GSM-102 credit guarantees. Egg exports to the United Arab Emirates, another market targeted by the EEP, about tripled in 1992.

MANY COUNTRIES TAKE STEPS TO SHUT DOWN U.S. POULTRY IMPORTS

As stated above, the rise in U.S. broiler parts exports has been met by an eruption of trade barriers throughout the world. Since the end of 1991, a number of countries have erected a wide array impediments to limit U.S. poultry imports. Some of the barriers have been technical in nature (e.g. sanitary regulations and requirements, disease-free certification). For the most part, the technical barriers have lacked scientific merit. In other cases, countries have created new tariffs or resorted to using contrived customs valuation procedures. Furthermore, media campaigns aimed at discrediting the quality of U.S. poultry have been used as a tactic to curb U.S. imports. The various actions taken to halt U.S. imports generally came in response to cries from local producers seeking protection from competitively priced U.S. dark meat imports.

The countries seeking to block U.S. parts imports often allege "dumping" to justify shutting off U.S. broiler parts imports. No country has ever substantiated the claims that the United States is dumping. U.S. broiler dark meat cuts are among the cheapest sources of meat protein on the world market. However, the competitive prices U.S. exporters offer for dark meat cuts does not imply dumping. Rather, as outlined earlier, the prices reflect the distinct competitive advantage the United States has in the production of dark meat cuts and represent the "true value" of the dark cuts within the U.S. domestic market.

Nowhere has the resistance to U.S. poultry imports been stronger than in Central America. Largely driven by local politics, the countries of Central America have taken a variety of measures to limit U.S. poultry part imports. Moreover, there is evidence of a concerted and coordinated crusade by poultry producers and governments in Central America to devise strategies to block U.S. imports. At a December 1992 summit in Panama City, Central

American agricultural leaders agreed to adopt a common policy to restrict the entry of U.S. chicken meat. In addition, the Central American Poultry Producer's Federation recently had two meetings in Honduras and El Salvador to examine methods to limit poultry exports to the region and ways to influence government trade policy. Central American governments are still searching for a consistent and uniform strategy to fight U.S. imports. Honduras and El Salvador effectively shut down their markets to U.S. products after requiring that U.S. poultry products carry specific zoo-sanitary certificates showing the poultry is free from selected diseases. Pressure is being applied to other Central American governments to adopt a similar approach. While broiler exports to the region almost doubled in 1992, agricultural officials from Central America continue to express the necessity for protecting their respective poultry industries.

Many of the trade policy issues erupting in 1992 can be attributed to the collapse of the market for dark meat in the former Soviet Union (FSU). In 1990, the FSU imported 136,500 tons of leg quarters from the United States, 83,039 tons in 1991, but only 5,562 tons in 1992. With the collapse of the FSU market, U.S. exporters began to look for other market outlets. As the U.S. presence in these markets grew, internal political currents forced governments to take protective measures.

The following section describes some of the more salient issues adversely effecting U.S. broiler trade in 10 different countries and illustrates some of the difficulties facing U.S. broiler exporters.

1. CHILE IMPLEMENTS DE FACTO BAN ON U.S. IMPORTS

In February 1992, Chile issued revised regulations governing poultry imports which effectively banned imports from the United States. Specifically, the new regulations required that imported poultry meat be tested and certified free from Salmonella. The U.S. government is unable and unwilling to guarantee that any poultry is free from Salmonella. The Salmonella bacteria is ubiquitous in poultry operations throughout the world and is almost impossible to eliminate from fresh/frozen meat. Sources indicate Chile's decision to impose the new regulation was entirely political and reflected producer pressure to curtail low-priced U.S. dark meat imports. In early 1993, Chile began to link the resolution of the de facto ban (Salmonella testing) on U.S. poultry imports to U.S. action on facilitating exports of Chilean poultry to the United States. Now Chilean officials are stating they will recommend no change in the Salmonella testing requirement until the United States takes steps to permit Chilean access to the U.S. market.

2. COLOMBIA RESPONDS TO GROWING POULTRY TRADE WITH THE UNITED STATES BY BANNING IMPORTS

In 1992, the United States exported 4,188 tons of broiler meat to Columbia, about 5 times the quantity exported in 1991. The growth in imports continued in the first two months of 1993. Then, on 9 March 1993, Colombia cited isolated occurrences of non-pathogenic Avian Influenza (AI) in a few backyard flocks in the United States to justify the implementation of an import ban on all U.S. poultry products. The AI virus was not found in any commercial flocks, was not pathogenic to laboratory chickens, and did not produce any significant illness in flocks from which it was isolated. In May 1993, two Colombian veterinarians visited the United States to review the situation. Possibly fearing an impending end to the ban on U.S. poultry, Colombia issued a ruling requiring that all slaughterhouses and areas of origin exporting to Colombia must be annually inspected by Colombian veterinarians. This ruling no doubt pleased the Colombian poultry industry, which had been imploring the government to maintain the ban. Furthermore, the media in Colombia has been issuing statements questioning the quality of U.S. meat. In the meantime, the Colombian government has been hinting that if allowed to export breast meat to the United States, the issue of eliminating the ban on U.S. poultry meat could possibly be revisited.

3. CZECH REPUBLIC TAKES ACTION TO PROTECT DOMESTIC PRODUCERS

In the first quarter of fiscal year 1993, the U.S. allocated $6 million under the GSM-102 commercial credit guarantee program to Czechoslovakia for the purchase of poultry meat. When the Czech industry learned of this trade facilitating program, it organized forces to oppose it. Responding to local demands, the Government of Czechoslovakia attempted to postpone poultry imports from the United States by specifying that the poultry come only from U.S. plants inspected by Czech officials. The United States agreed to allow Czech technicians to come to the U.S. to check the plants. Before the inspections occurred, Czechoslovakia split, and the entire $6 million GSM-102 credit was given to the Czech Republic. The Czech press learned about the reallocation of the GSM-102 credit and portrayed the program as an export subsidy program bent on destroying the local poultry industry. Under pressure from the press and local producers, the Czech government refused to permit Czech veterinary inspectors to visit plants in the U.S., even though a number of U.S. exporters and Czech importers had made preliminary arrangements to trade poultry meat. As local opposition to the program continued to grow, the Czech Republic began to float the idea that a "compensatory duty" would be increased from 12 to 41 percent. When the import tariff of 12 percent is added, the total tax on poultry imports would have been 53 percent. Finally, in an effort to avoid jeopardizing the overall GSM-102 program (the Czech

Republic is allocated a total of $25 million for FY 1993), the United States offered to reallocate the poultry meat credit line to another commodity, and there have been no U.S. poultry exports to the Czech Republic.

4. EL SALVADOR RESTRICTS U.S. TRADE BY IMPOSING ZOO-SANITARY REQUIREMENTS

On 11 August 1992, the Government of El Salvador announced new regulations for chicken meat imports. The regulations unreasonably require that imported meat be certified free from a plethora of micro-organisms. The new requirements were specifically directed at halting imports from the United States.

5. GUATEMALA IMPLEMENTS TARIFF RATE QUOTA SYSTEM AND APPLIES FAULTY IMPORT VALUATION MECHANISM

U.S. exports of broiler meat to Guatemala increased from essentially nil in 1989 to over 10,000 tons in 1992. After several attempts to block U.S. poultry meat from the Guatemalan market (in July 1992, Guatemala issued an outright ban on chicken part imports), in November 1992 the Government of Guatemala (GOG) instituted a tariff rate quota system for poultry meat imports. Currently, the first 300 tons of broiler parts entering Guatemala each month are subject to a 20 percent tariff. All imports over 300 tons per month face a 43 percent tariff. While the basic structure of the tariff rate quota is GATT-consistent, the method used to calculate the absolute value of the tariffs does not conform with GATT regulations regarding proper customs valuations procedures. Guatemala ignores the real value of broiler imports and arbitrarily imposes a $U.S. 0.56/lb. value on all broiler meat. As the price of leg quarters (the primary poultry product the U.S. exports to Guatemala) is generally about half this price, this valuation procedure doubles the duty on leg quarters relative to what the tariff would be if the product was valued correctly. Guatemala has yet to respond to the U.S. government's request to change this valuation procedure. In fact, there are indications that Guatemala intends to adopt zoo-sanitary regulations similar to those of El Salvador and Honduras to further restrict imports to protect domestic producers.

6. HONDURAS FIGHTS U.S. BROILER IMPORTS

Although there are no formal prohibitions or licensing requirements on imports of poultry meat to Honduras, the Government of Honduras has enacted a number of sanitary barriers preventing the U.S. from exporting poultry meat to Honduras (U.S. exports to Honduras totaled about 900 tons in 1992). In addition, the press in Honduras has been impugning U.S. poultry meat imports (e.g. U.S. poultry is "contaminated" or it is being "dumped").

7. NICARAGUA IMPOSES LICENSING REQUIREMENT ON BROILER PARTS

At the beginning of 1991, the Government of Nicaragua (GON)

liberalized poultry imports. After GON opened its market, U.S. exports of broiler parts to Nicaragua experienced a dramatic increase, reaching about 760 tons per month by September of 1991. In response to an outcry for protection from local producers, on 13 September 1991, GON announced that no parts could be imported without an import license. As GON refuses to issue import licenses, a de-facto ban was placed on U.S. broiler part imports (about 3,000 tons of U.S. broiler parts slipped into Nicaragua in 1992, about 75 percent the quantity imported in 1991). GON has noted that the ban is intended to be temporary, but has given no indication when or if the import license requirement will be relaxed. The GON has indicated the possibility of establishing a monthly quota and issuing licenses to satisfy the quota, but has balked at setting the quotas equal to the level of imports when the ban was implemented.

8. POLAND INCREASES IMPORT DUTIES TO COMBAT U.S. IMPORTS

U.S. exports of broiler meat to Poland grew from just a little over 1,000 tons in 1991 to 34,328 tons in 1992 (fifth largest market for U.S. broiler meat in 1992). U.S. exports to Poland remained strong through the first quarter of 1993. Fearful of the growing competition from imports, Polish producers persuaded their government to impose a minimum tariff ($U.S. 0.35/kg) on poultry meat imports and then launched a press campaign maligning the quality of U.S. broiler meat. To further reduce U.S. imports, Poland is considering the use of a variable levy.

9. SOUTH AFRICA APPLIES PUNITIVE DUTIES ON U.S. BROILER MEAT

U.S. exports to South Africa jumped from a little over 100 tons in 1991 to almost 7,000 tons in the first three quarters of 1992. Then, in November 1992, the Government of South Africa (GSA) announced that additional duties on U.S. broiler part imports would be implemented. GSA justified the additional duties as being were necessary to protect its domestic industry from low-priced U.S. poultry products. The new duties were set at extremely high levels, essentially shutting off U.S. broiler part imports.

10. VENEZUELA INCREASES DUTIES THEN PLACES AN OUTRIGHT BAN ON U.S. IMPORTS

U.S. exports of broiler meat to Venezuela more than doubled in 1992, reaching almost 7,000 tons. In November 1992, the Government of Venezuela (GOV) increased the duty on imported poultry meat from 20 to 32 percent. The GOV took the action after the Venezuelan poultry industry waged a three month media campaign which called for protection from imports, questioned the quality of imported U.S. poultry meat, and claimed that the United States subsidizes poultry exports to Venezuela. After imports continued to grow in early 1993, the Venezuelan poultry industry published a full page newspaper story on 3 March 1993 critical of imports from the United States. In the wake of the press

campaign denouncing imports of allegedly subsidized poultry, on 8 March 1993, GOV banned all imports from the United States, citing the presence of AI in the United States as justification for the suspension of U.S. poultry imports (see Colombia).

DESPITE GROWING TRADE BARRIERS

PROSPECTS FOR U.S. POULTRY EXPORTS REMAIN BRIGHT

While the mounting trade barriers are a vexing problem for U.S. exporters, U.S. exports are forecast to continue expanding through 1994. The value of U.S. poultry product exports in 1993 should surpass the record-breaking sales of 1992 and reach about $1.3 billion. Again, most of the increase will be due to growth in broiler meat sales. Led by continued growth in exports to Hong Kong, broiler exports are forecast to increase about 17 percent in 1993. The strong growth in turkey exports to Mexico in recent years is expected to subside somewhat in 1993, and total U.S. turkey exports are forecast to increase around 9 percent. Exports of further-processed poultry products increased about 42 percent in the first five months of 1993 compared to the same period in 1992, and exports of these products are forecast to continue growing the rest of 1993. Facing reduced opportunities on the world market, especially in Japan, U.S. egg and egg product exports are forecast to decline somewhat. U.S. egg product exports to Japan declined about 35 percent in the first five months of 1993, compared to the same period in 1992.

WORLD BROILER MEAT PRODUCTION AND DISTRIBUTION

In 1992, the production of broiler meat in reporting countries increased to 28.2 million metric tons, a 5 percent increase over the 1991 production level. As represented by reporting countries, world trade in broiler meat grew about 11 percent due mainly to growth in exports and imports of parts and further-processed broiler cuts. The United States remained by far the largest broiler producer, consumer, and exporter. Brazil held its position as the second leading broiler producer, though China is rapidly approaching. Brazil's exports continued to expand, solidifying its place as one of the world's dominant broiler exporters. Increased production in France, the largest producer in the EC, accounted for about 50 percent of the EC's growth in output. While EC trade with non-EC countries grew, broiler commerce within the Community grew to a greater extent. In Asia, China's broiler sector expanded at an astonishing rate, while Thailand maintained its position as Asia's number one exporter. Imports into Hong Kong, Japan, and China all increased sharply, making Asia the largest market for the world's broiler exporters. Demand for whole broilers in the Middle East continued to grow, but at a somewhat slower pace than in recent years. Eastern Europe and the FSU, where the broiler industries are still struggling to adapt to rapidly changing economic and political forces, were the only regions where broiler production declined.

With the exception of those two regions, the outlook for the world broiler situation in 1993 appears bright. The growing diversity of low-cost broiler products available on the world market and advances in quality control measures are stimulating demand for broiler meat throughout the world. As a result, broiler meat production, consumption, and trade is forecast to continue growing in 1993.

BROILER SITUATION AND OUTLOOK IN SELECTED COUNTRIES

BRAZIL'S BROILER PRODUCTION AND EXPORTS CONTINUE TO GROW IMPRESSIVELY

Brazil's broiler production is forecast to increase about 8 percent in 1993 following a 9 percent increase in 1992. Although the pace of expansion of Brazil's broiler sector has slowed in recent years, Brazil's sector has accomplished significant year-to-year growth since 1985. In 1993, relatively large soybean and corn crops are leading to stable feed prices, fueling the continued growth. However, the persistent sluggishness of Brazil's economy and expectations of reduced exports in 1993 should prevent growth beyond the 8 percent forecast. Brazil's economy is still in the midst of its longest economic recession on record. Preliminary macro-economic data for 1993 indicate a continued drop in GDP at over 1 percent, high unemployment, and inflation rates between 25-28 percent per month. On the brighter

side, economic growth is expected to rebound in 1994 and inflation is forecast to slow somewhat, which should provide a boost for the broiler sector.

Despite Brazil's troubled economy, consumption of broiler meat will continue to expand in 1993 due primarily to favorable broiler prices relative to red meat prices. The increased availability of further-processed chicken products is also helping to stimulate demand. After growing by about 8 percent in 1992, Brazil's broiler consumption is forecast to grow another 10 percent in 1993. The Brazilian broiler industry has adopted a strategy of trying to boost returns by selling more further-processed products domestically. A change in Brazilian consumer habits has increased demand for fast-food products and for more convenience foods, and broiler merchandisers are responding accordingly. Also, the continued high beef prices are reinforcing consumers' attitudes favoring chicken over beef.

Despite complaints from Brazilian poultry exporters about the U.S. Export Enhancement Program and EC subsidies and levies, Brazilian broiler exports increased about 17 percent in 1992. Exports reached a record 378,000 tons, about 13 percent of total broiler production. Whole broiler exports totaled 214,000 tons, an increase of 14 percent, due mostly to a boom in sales to Argentina. Exports to Saudi Arabia, Brazil's largest customer, declined slightly. Propelled by major gains in exports to Japan, Hong Kong and the EC, broiler parts sales reached a record 137,000 tons. Although volume exported increased an average 17 percent, export value increased only 11 percent in 1992. Average FOB prices for Brazilian whole broilers and parts during 1992 were $941 and $1,489, respectively.

Brazilian broiler exports in 1993 are forecast to drop 5 percent, although some trade sources estimate a drop in exports as high as 10 to 12 percent. Export receipts are also expected to drop due to lower world prices. Brazilian broiler traders expect sales to fall in 1993 for the following reasons: 1) lower exports to Argentina due to an unfavorable exchange rate; 2) reduced sales to Japan and Germany; 3) slower sales to the EC overall due to tariffs on Brazilian broiler parts ($400 per ton); and 4) heightened competition from the United States and EC.

To counter these problems, Brazilian poultry exporters are concentrating their efforts on opening new markets. The traders hope to become less dependent on their few major import markets, notably Saudi Arabia for whole broilers and Japan for broiler parts. Promotional efforts are centered in markets in Asia and Argentina. The two leading Brazilian exporters are also targeting Japan in their promotional efforts to cultivate a market for further-processed items. Moreover, Brazilian companies are investing in new production equipment geared to supply new specialized broiler parts to Japan.

BRAZIL'S MAJOR BROILER EXPORT MARKETS, 1988-1992 (1,000 TONS)					
COUNTRY	1988	1989	1990	1991	1992
SAUDI ARABIA	105.6	84.2	101.2	125.9	122.1
OTHER MID-EAST*	36.8	20.4	32.9	37.1	50.8
JAPAN	38.3	36.9	40.1	56.5	65.1
EC	11.8	20.4	28.0	28.1	44.7
ARGENTINA	0	0	0	23.3	39.0
CUBA	8.3	20.6	26.5	18.8	0
OTHERS	35.5	61.6	71.3	32.6	56.3
TOTAL	236.3	243.7	300.0	322.3	378.0

*Other Mid-East includes Bahrain, Egypt, Kuwait, Jordan, Lebanon, Oman, Qatar, and Yemen.

CANADA INCREASES IMPORT LEVELS DUE TO LIMITED DOMESTIC SUPPLIES

Broiler output in Canada during 1992 fell fractionally from the 1991 level due to the conservative production allocation set by the Canadian Chicken Marketing Agency (CCMA). The production cutbacks were most evident in Ontario and Quebec, the major producing provinces. However, this attempt to tailor supply to demand resulted in production failing to keep pace with demand. The upshot of this shortfall was record levels of supplementary imports allocations (i.e., beyond the global import allocation) from the United States. Based on projections for an economic recovery and higher retail prices for red meats, CCMA has raised the production target for 1993, which is expected to result in broiler production growing about 5 percent over the 1992 level.

Supply management policies continue to suppress poultry meat consumption in Canada and to impede activity and innovation in the further processing and food service sectors. Under the supply management system, high chicken prices constrain Canadian chicken consumption. Studies indicate that broiler consumption would be at least 10-15 percent higher if supply management tools were not in place. Supply management has also severely hindered new product development by the further processing industry and hampered the fast food industry's access to the quantity and type of product necessary for menu expansion and promotion. In short, supply management pricing and production policies have prevented Canada's poultry sector from participating in the

rapidly expanding world market for poultry meat and have stymied any appreciable gains in efficiency in Canada's broiler sector.

Under the U.S.-Canada Free Trade Agreement, Canada's global import quota for chicken is based on 7.5 percent of the previous year's Canadian domestic production. For 1992, the quota was approximately 43,200 metric tons. However, issuances of supplementary import permits allowed actual imports in 1992 to exceed 57,000 metric tons, nearly one-third more than the quota formula. Issuances of the supplementary import permits resulted in record chicken imports from the United States. The 1993 global import quota is expected to be approximately 43,100 metric tons, fractionally lower than 1992 due to the production decline of 1992. However, this quantity is not expected to satisfy Canada's needs, and imports are forecast to reach 61,000 tons in 1993.

In addition to regular supplementary quota issuances in 1992, Canada established a special supplementary access quota for a large, U.S. based fast food restaurant chain operating in Canada. Canadian restrictions on chicken meat imports were adversely affecting the company's business in Canada because Canadian sources could not provide the necessary types of products needed by the company. Beginning in 1993, Canada also made a technical change to the quota system that will marginally increase U.S. access. For battered and breaded chicken imports, the weight of the batter and bread will no longer be counted against the global quota. These changes will directly benefit U.S. exports to Canada, which are forecast to grow in 1993.

CHINA'S BROILER INDUSTRY IS EXPANDING AT A PHENOMENAL PACE

The unleashing of free market forces in China is transforming China's poultry industry into one of the most dynamic agricultural industries in Asia. No longer hampered by inefficient centrally-controlled production and distribution systems, the broiler sector is bustling with entrepreneurial activity and innovation. Spurred by a generous influx of foreign capital, technology, and breeding stock, China's broiler output reached 2 million tons in 1992, a 16 percent increase over the previous year. For 1993, China's broiler sector is forecast to increase output another 13 percent. While individual households still account for the bulk of poultry production in China, the distinct trend toward the development of large-scale broiler operations is beginning to alter the landscape of the industry. Many of the new broiler farms are fully integrated facilities with on-site feed mills and processing capability. The modern technology, use of compound feed, and the introduction of improved breeding stock that has accompanied the new facilities has tremendously boosted the efficiency of China's broiler operations. In Zhejiang province, for example, the feed conversion ratio has declined from 3.4:1 in 1988 to 2:1 in 1992.

Even though China's broiler sector is expanding at a rapid pace, the industry still has many obstacles to overcome. Nationwide, mortality rates are an alarming 25 percent, although mortality rates are probably significantly lower for many of the newer large scale operations. Feed costs continue to rise, causing producers to rely on further advances in efficiency to maintain profitability. Urban sprawl is forcing some producers to relocate as municipal real estate prices soar. Additionally, central and provincial governments are beginning to express concerns about the effects of high volume production on the environment. Another problem facing the industry is the slow development of sufficient cold storage and distribution networks needed to alleviate oversupplies in some localities.

Despite these problems, foreign investors continue to establish even larger production operations in China. Several projects under joint venture with foreign companies became operational last year or are scheduled to operate within the next two years. Numerous Japanese trading companies, U.S. based international grain companies, the Thai CP Group, and other Asian companies are involved in the investment fever in China. Reportedly, most of these firms intend to use China as a base to serve Japan's lucrative broiler meat market.

While growth in China's broiler sector is being spurred mainly by demand for broiler meat in Japan, growth in domestic demand is also contributing to the sector's expansion. Domestic consumption of broiler meat in China increased about 13 percent in 1992 and is forecast to increase another 14 percent in 1993. In China, most poultry is still purchased in traditional wet markets, but the expansion of supermarket chains is introducing consumers to new ways of buying chicken. It is estimated that in Shanghai only 5 percent of poultry purchases are made in supermarkets, but interest is growing as more supermarkets open. Besides a growing number of supermarkets, the fast food industry is exploding in China. Chinese have traditionally eaten in the street because limited cooking facilities in homes encourage people to eat out. With their growing incomes, China's consumers are increasingly opting to eat out at fast food outlets. Kentucky Fried Chicken is well established, McDonalds is flourishing, Wendy's is now exploring the market, and these Western imports have spawned a multitude of domestic copies. Even Beijing duck can now be procured at a some fast food restaurants.

On a nationwide basis, per capita consumption is still low (1.68 KG in 1992), and does not accurately reflect what production data would suggest. Urban consumption data provides a more accurate gauge of actual consumption. With a population of 1.2 billion people, each 0.2 KG per person increase in consumption requires another 240,000 tons of annual meat production. Official consumption statistics are beginning to reflect what rising production data and the expanding food service sectors imply, i.e. poultry meat consumption in urban

China is booming. In Shanghai, for example, annual per capita poultry product consumption was estimated at 9.6 KG in 1992 (according to the 1992 China Statistical Yearbook) and is expected to double by the year 2000. The disparity between urban and rural incomes and production policies directing processing facilities to the vicinity of urban areas means that rural poultry consumption will continue to lag behind urban consumption.

Commensurate with the expansion of broiler production and consumption in China, China's exports of broiler meat increased about 42 percent in 1992 to 110,000 tons and are forecast to grow 17 percent in 1993. Despite some Chinese processors' claims of soft international markets in 1992, China realized gains in all of its major markets. Exports to Japan, which accounted for about 44 percent of sales, increased 85 percent. The outlook for exports in 1993 appears very bright. Led by growth in sales to Japan, first quarter trade statistics in 1993 are running 30 percent ahead of the same time period in 1992.

The rapid growth of integrated producers with onsite processing, both local and foreign owned, is a clear indicator that China is here to stay as a major player in world poultry trade. One of the reasons China's presence in the world market can now be considered permanent is the stable market for broilers in nearby Japan. As stated earlier, much of the expansion of China's broiler sector can be attributed to foreign investors eyeing Japan's market. In Japan, China is in direct competition with Thailand for a portion of the specialized cuts/frozen deboned leg segment of the market. Industry sources in China familiar with both the Chinese and Thai broiler sectors point out that labor costs in China are much less than in Thailand. Some industry experts speculate that besides the processed/frozen deboned segment, China may become a strong contender to compete in Japan's chilled/fresh market, which traditionally has been supplied only by Japan's domestic broiler producers. Due to China's geographic location relative to Japan, port to port transportation takes two to three days, almost identical to the time it takes to get product from the most distant producing locations in Japan. However, China must still overcome technical deficiencies to meet Japan's stringent safety and quality standards and specification requirements.

China's official trade figures represent only part of what is happening in terms of China's broiler imports. Trans-shipments through Hong Kong and rampant smuggling make it difficult to estimate the true volume of broiler products entering China. Import figures quoted by individual traders are well in excess of the official data, even when Hong Kong re-exports are included. For 1992, official Chinese data show broiler imports at only 70,000 tons, but most sources in Hong Kong and southern China indicate the trade reached well over 100,000 tons. The demand for imported poultry meat in southern China should continue growing in 1993, and a 15 to 20 percent increase in imports is forecast.

FRANCE'S BROILER EXPORTS AND PRODUCTION GROW BUT PRODUCER'S EXPRESS CONCERN ABOUT THE FUTURE

Stimulated by domestic demand and rising exports to other EC Member States, French broiler production increased about 12 percent in 1992. At 1.1 million tons, broiler production ranked third behind pork (2 million tons), and beef (1.7 million tons). The French broiler sector continues to expand as factories become more specialized and production more regionalized. Also, the industry is responding to EC consumer demands by developing processed, high-quality meat, and variety cuts. In addition, total production of "free range" broilers is rising. An increased public awareness of animal welfare issues has stimulated growth in the "free range" niche market. Moreover, producers receive a premium for these products, giving growers the incentive to expand into the "free range" mode of production. The specific production methods and feed requirements that are obligatory (birds must spend more than 98 percent of their lives in the open air, etc.) is creating a positive image of these products among French consumers, and production and consumption of this type of broiler product is forecast to continue growing in the future. Overall broiler production in France is forecast to grow another 8 percent 1993.

Consumption of broiler meat in France increased 17 percent in 1992, and the trends of growing part consumption and declining whole bird consumption continued in 1992. Household consumption of whole carcasses dropped 3 percent, while purchases of parts rose 10 percent. The growing consumption of parts is being fueled by the French broiler industry's stepped-up efforts to supply diversified products at prices needed to compete with red meat products. Consumers are expected to continue responding positively to these marketing efforts, and consumption is forecast to increase another 10 percent in 1993.

In 1992, French broiler exports increased 7 percent to 429,000 tons, while imports increased about 50 percent to 68,000 tons. Exports of whole carcasses continue to comprise the dominant portion of French broiler exports, accounting for about 77 percent of sales in 1992. Shipments to other EC Members States increased about 8 percent to 160,000 tons. The United Kingdom is the leading EC market for French exports, with whole carcass exports close to 49,500 tons (up 16.3 percent) in 1992. The growth trend in exports to Germany came to a halt in 1992. The rejuvenation of Germany's broiler sector caused French exports to the German market to drop about 2 percent. Also, fresh broiler exports to Germany are suffering from aggressive competition from the Netherlands. French exports to Belgium continued to rise in 1992, up 7 percent to 9,000 tons. Such shipments are important for the French poultry industry since they are mainly fresh, high-value products. French broiler exports to the Middle East, France's largest market outside the EC,

increased 7 percent to 207,000 tons, but total value was down as the average export price declined about 13 percent. Exports to Saudi Arabia totaled 119,300 tons (up 10 percent) accounting for 57 percent of French exports to the region. Exports to the United Arab Emirates decreased about 6 percent in volume, due to the continuous growth in the Emirates' domestic production. While exports of whole broilers comprise the dominant portion of French broiler exports, French exports of parts rose to 87,000 tons in 1992, up 35 percent. However, the value of exported deboned products declined about 10 percent due to aggressive competition in certain markets, particularly in the market for frozen products.

FRANCE'S MAJOR BROILER EXPORT MARKETS, 1988-1992 (1,000 TONS)

COUNTRY	1988	1989	1990	1991	1992
SAUDI ARABIA	91.3	86.5	113.5	108.1	119.3
OTHER EC MEMBERS	90.0	114.6	133.1	149.1	160.0
OTHER MID-EAST*	52.5	62.1	60.7	75.2	88.3
AFRICA	40.2	37.1	17.3	32.2	27.3
NON-EC EUROPE	12.1	13.7	8.1	9.1	6.4
OTHERS	9.0	35.0	26.0	27.0	28.0
TOTAL	295.1	349.0	358.7	400.7	429.3

Other Mid-East includes United Arab Emirates, Jordan, Oman, and Iran.

In 1993, French broiler exports to other EC member states are expected to show significant gains over 1992 results. However, poultry exports to third countries could stagnate in response to aggressive competition, particularly from Brazil and the United States, and growing uncertainties concerning future funding by the EC for export subsidies. Based on expectations of stable demand for French broiler meat in other EC countries, France's exports are forecast to increase about 2 percent in 1993.

French broiler processors and producers are forecasting difficult times ahead. They are concerned about their growing reliance on markets within the EC, deeply troubled by new environmental regulations being imposed, and fear the ramifications of the impending GATT agreement. In terms of the EC market, they fear they could find themselves trading in a comparatively profitless market where the average prices paid by households are declining. In addition, they see no end to the current economic malaise in EC, which they feel is depressing overall consumption.

New regulations geared to preserve the environment are also a point of concern for French broiler producers. According to many poultry producers, the average cost of the new environmental regulations is impossible to bear during this period of "hard times" in the French economy. Since no public funding has been provided to cover the additional expenses incurred by new regulations, French producers announced that the costs involved in shifting from "intensive" to "sustainable" production should be passed onto the consumers. The question remains whether or not this strategy will be accepted by processors and distributors, particularly at a time when sales opportunities are limited by the sluggish economy.

Like the rest of France's agricultural sector, the poultry industry is also worried about an impending GATT agreement. The industry is claiming that the structure of the poultry industry would be at risk if a GATT agreement is reached. The second largest French poultry producer/processor has warned the French Government about the effects of a GATT agreement on the poultry sector. The company claims that under the current agricultural proposal France alone would have to reduce its poultry meat production by 200,000 tons due to larger imports and reduced export subsidies for third country markets. The company insists that the French government is merely looking after the competitive interests of multinational feed manufacturers, at the expense of the poultry sector. Furthermore, the company has suggested that a GATT agreement would jeopardize the development of the broiler sector and impede economic activity in rural areas.

JAPAN'S STOCK LEVELS SOAR AMID GROWING IMPORTS AND FALTERING CONSUMPTION

Reversing a 5 year trend of continuous reductions in broiler meat production, Japan's broiler meat output rebounded a moderate 1 percent in 1992 to 1.25 million tons. Expanded slaughter capacity combined with slightly larger bird size contributed to the moderate increase in meat production. Japan's total number of broilers in 1992 declined 1 percent to 135 million birds, down 1 percent from the previous year. The number of broiler farms dropped 6 percent from 4,720 to 4,448 over the same period. Meanwhile, the average flock size per farm increased 5 percent. Average broiler farm sizes are expected to continue to become larger as more small farmers leave the sector, unable to compete with large domestic producers. Competition from less expensive imports and environmental regulations that are increasing waste management costs are the main factors causing the structural changes of the industry. Also, like the rest of Japan's agricultural sectors, the broiler sector is plagued by a lack of successors prepared to assume the responsibility of running the family farm.

With the end of the "bubble" economy, serious labor shortages, which

previously had prevented many plants from operating fully, have reportedly eased. The number of broiler slaughter facilities in Japan now totals 314 plants, 34 less than in 1991, reflecting the departure of small processors. As a result, per plant slaughter volume in 1992 increased 12 percent over the previous year.

Despite (and because of) the gains in production achieved in 1992, the outlook for Japan's processors is not bright as prospects of declining profitability linger. Many facilities sustained financial losses in 1992 while struggling to recover the recent years' investments required to satisfy Japan's newly introduced poultry inspection system. Various market indicators confirm the difficult year in 1992 for Japanese broiler processors and producers. The 1992 average farm-gate price declined four percent, and the average wholesale price of de-boned leg and breast meat declined 6 percent and 14 percent, respectively.

The drastic drop in broiler prices reflected a severe over-supply situation. Along with the growth in production, imports rose an impressive 13 percent, reaching record levels. Inevitably, broiler meat stock levels surged in 1992, up 44 percent when compared to 1991 average levels. Excess stocks continued to build during the first quarter of 1993, averaging over 86,000 tons, up 15 percent compared to the corresponding period of 1992. Imports account for an estimated 85 percent of total stocks. Excess supply continues to be exemplified by depressed market prices and persisting stocks, which are expected to linger throughout most of 1993. Current and projected chick placement numbers suggest that broiler meat producers are responding to the low prices by cutting back, and production is forecast to start dropping again in 1993.

Broiler meat consumption increased about 4 percent in 1992, but is forecast to remain flat in 1993. Consumption is not expected to rebound until the recession stricken Japanese consumers regain confidence in the economy. Institutional and food service sectors use about 60 percent of total poultry consumed in Japan with households accounting for the remaining 30 percent. Domestically produced fresh products dominate consumption at the household level, while most imports go directly to the food service and processing sectors. The current market tendency in the retail and food service sector is a shift toward more specialty cuts and processed products. Retailers increasingly demand highly defined cuts, and the food service, and processing industries seek not only tailor made poultry cuts but also highly processed products like breaded chicken nuggets and flavor enhanced products. The domestic broiler industry has been slow to cater to the urgent market need for further processed products, a market where imported products are thriving.

In the food service sector, industrial demand for highly-processed foods is anticipated to continue growing in 1993. Diverse types of inexpensive broiler cuts will likely be in demand as

restaurants are pressed to design low cost menus. Food costs are a serious concern for Japanese food service industry as consumers are increasingly price conscious.

Japan's broiler meat imports in 1992 totaled 393,000 tons, up 13 percent over 1991. Imports from the United States declined five percent due primarily to a significant decline in the imports of U.S. bone-in legs, which comprised 66 percent of total U.S. poultry exports to Japan in 1992. Similarly, bone-in leg imports from Thailand and Brazil also decreased 7 and 9 percent, respectively. An increased availability of inexpensive domestic legs apparently substituted for imports. U.S. exports of other broiler cuts increased an impressive 19 percent. However, the decline in bone-in leg imports from the United States outstripped the growth in U.S. parts imports causing total U.S. imports to fall.

Thailand, Brazil, and notably China expanded total export volume in 1992, increasing 12 percent, 14 percent, and 84 percent, respectively. As a result, the major exporters' market shares in 1992 were: Thailand, 36 percent (down 1); United States, 30 percent (down 5); Brazil, 17 percent (up 2); and China, 15 percent (up 6 percent).

JAPAN'S BROILER IMPORTS BY SOURCE, 1988-1992 (1,000 TONS)

COUNTRY	1988	1989	1990	1991	1992
THAILAND	85.7	90.5	108.1	125.5	145.5
U.S.	114.6	101.4	93.4	125.5	118.4
BRAZIL	38.3	36.9	40.1	56.5	65.1
CHINA	21.1	25.5	34.6	31.8	58.9
EC	2.8	3.7	3.1	4.0	3.7
OTHERS	1.1	16.5	14.3	4.3	5.5
TOTAL	260.8	270.8	290.5	347.0	393.4

The outlook for 1993 will be challenging for the United States as it tries to regain some of the lost bone-in leg market. Since most U.S. suppliers have long term customers, it is anticipated that the United States will be able to maintain its 1992 market share. The current weak dollar relative to the yen should also help U.S. suppliers take advantage of opportunities to expand business. On the other hand, China and Brazil have emerged as tough competitors of the United States in the boneless leg and wing markets. Competition will likely become even more acute in the future. Chinese products are in direct competition with Thailand, the major

supplier of highly processed products. Highly processed products are in great demand from Japanese food service and major supermarket chains. However, China must still overcome technical obstacles to meet not only the stringent safety and quality standards, but also strict specification requirements.

Brazilian products are used mainly by the food service industry and compete directly with the United States as both are increasingly catering to the needs of Japanese clients in terms of quality and specifications. Some major fast food chains have responded favorably to U.S. and Brazilian marketing efforts and are considering using imported products in lieu of domestic products. Buyers feel that exporting countries such as Brazil and the United States have improved the levels of quality and portion control and are offering products equivalent in quality to domestic suppliers.

NETHERLAND'S PRODUCERS SUFFER IN THE FACE OF ERODING PROFITS AND GROWING IMPORTS

Dutch broiler meat production in 1992 set another record, reaching 478,000 tons, about a 5 percent increase over the 1991 output level. Despite the recorded gains in production, average producer prices in 1992 were slightly (2.2 percent) lower than in 1991, and producer profits actually eroded somewhat. Like producers' prices, average export prices dropped about 1.5 percent from 1991 levels. Rising feed costs and deteriorating prices caused producers to experience serious economic difficulties in 1992, especially during the latter half of the year. The sector's problems are not yet over as producer prices sagged by 5.3 percent during the first 4 months of 1993. Producer prices are expected to remain under pressure during the remainder of 1993, while broiler feed prices are expected to remain stable. Due to these two factors, broiler production in the Netherlands is forecast to decline about 2 percent in 1993. Higher output in other EC countries, particularly France, should continue to affect the continued weak trend in Dutch broiler prices.

Dutch broiler meat consumption in 1992 rose by about 3 percent. As is the case in most EC countries, whole broiler purchases are declining while part consumption is on the rise. In addition, the consumption of processed convenience food products like cordon bleu, nuggets, and burgers is growing. Household purchases of these products increased over 6 percent in 1992. Data for the first quarter of 1993 suggest that purchases of broiler meat continue to increase. With the anticipation of weak broiler prices through the rest of 1993, demand for broiler meat should remain firm, and consumption is forecast to grow about 4 percent in 1993.

Mainly as a result of greater sales to countries outside the EC, Dutch exports of broiler meat increased about 12 percent in 1992. Local firms are focussing on exporting either relatively

cheap parts, such as wings, feet, backs and necks, giblets, or frozen deboned meat and convenience products. Reflecting this, exports of whole birds rose less than one percent, while parts exports grew about 19 percent.
Overall, 1992 exports to third countries rose by 37 percent. Significant increases were recorded in exports of frozen deboned meat (up 39 percent), bone-in parts (up 33 percent), and wings (up 27 percent). The share of exports going to other EC member countries dropped from 89 percent in 1991 to 86 percent in 1992. Outside the EC, the major markets were: Hong Kong (comprising 41 percent of total Dutch extra-EC exports), China (17 percent), African countries (12 percent), Singapore (11 percent), and Poland (8 percent). The important buyers of whole broilers in 1992 were Singapore and countries in Africa. The major growth markets were Hong Kong (up 34 percent) and Singapore (up 18 percent). Demand for Dutch broiler products is expected to remain firm in 1993 and exports are forecast to grow about 4 percent.

Imports are relatively insignificant, accounting for only 14.9 percent of total supply in 1992. However, the share of imports in total supply is rapidly increasing, growing from around 4.6 percent of total supply in 1985 to its current level. Meat imports in 1992 were about 57 percent higher than a year ago and consisted of about 80 percent parts, especially deboned meat, back and necks, bone-in breasts, and bone-in legs and wings. Ninety percent of the imports came from EC member states with the remainder coming from Thailand, Brazil and Hungary. With the local industry finding it increasingly difficult to compete, imports are forecast to increase significantly again in 1993.

POLAND'S BROILER SECTOR BATTLES INEFFICIENCY AND LASHES OUT AT *IMPORTS*

Declining output and record imports characterized Poland's broiler sector in 1992. Decreasing profitability due to increased costs, inefficient production practices, and growing competition (from domestic pork, the Poles' favorite meat, and from imported poultry parts) is likely to reduce broiler production by 7 percent in 1993, following last year's 1 percent dip. Adding to broiler producers' financial problems, a severe drought in 1992 doubled feed prices. The effects of the drought, along with 40 percent interest rates and reduced energy subsidies, forced many broiler producers out of business. Some farmers tried to cut costs by purchasing low-quality chicks, blending feeds on the farm, and doing their own slaughter and retail, often with poor results. For example, the substitution of rapeseed meal, fish meal and dried skim milk for some imported feed ingredients reduced feed conversions below the already unimpressive 2.6:1 industry average. Moreover, poor feed quality extended the growing period beyond 8 weeks. With more farmers slaughtering their birds on the farm (often in inadequate sanitary conditions), large poultry

slaughterhouses are using only about 60 percent of their capacity. The increase in small-scale processing and distribution is only exacerbating the general state of inefficiency prevalent throughout all segments of Poland's broiler sector.

As production falls in 1993, consumption of broiler meat is expected to decrease by about 2 percent. Large stocks, continued imports, and anticipated stronger demand towards the end of the year will likely prevent a sharper decline. Meanwhile, demand is being constrained by huge supplies of pork (due to a massive pig liquidation) and eroding consumer purchasing power. The retail price of broiler meat rose 51 percent last year, well above the overall inflation in food items (44 percent). As a result, chicken became less competitive with pork, which experienced only a 28 percent increase in price. Poultry trails far behind pork and beef on Polish palates, accounting for just eight percent of total consumption. Most chicken is sold as whole broilers, although parts (mainly imported leg quarters) are becoming more popular.

The growing popularity of parts can be attributed to the availability of inexpensive imported broiler meat. Imports of chicken leg quarters experienced explosive growth in 1992, and represented one-fourth of commercial U.S. agricultural exports to Poland. More than 33,000 tons were received from the United States, mostly in the second half of the year. The record imports stemmed from attractive prices offered by U.S. exporters, eager to sell the dark meat, which Poles consider the best part of the bird. Total imports were about 37,000 tons. The Czech and Slovak Republics, the Netherlands, and Hungary were other suppliers.

Fearful of the large increase in imports during the latter part of 1992, Polish broiler producers began aggressively seeking to reduce U.S. imports through higher tariffs and by generating a press campaign denigrating the quality of the product. As a result, the Polish government introduced a minimum tariff on poultry meat of 30 percent ad valorem, but not less than $U.S. 0.35 per kilo, in May 1993. The tariff rate is the same for all suppliers, but was designed specifically to counter U.S. imports. While the minimum tariff increased the wholesale price of U.S. poultry meat, U.S. leg quarters remain about $U.S. 0.30-0.60/KG cheaper than local products. Meanwhile, the media reports criticizing the quality of U.S. imports does not yet seem to have affected consumers' perceptions, as U.S. imports continued relatively strong through the first quarter of 1993.

Chicken imports overall, however, are expected to decline nearly 40 percent this year as a result of decreased competitiveness with red meats, relatively large stocks, and the implementation of the minimum tariff. Poland likely will need to import 20-25 thousand tons per year over the next few years due to low local output. Also, development of fast-food outlets may contribute to the demand for imported chicken parts.

THAILAND REMAINS ASIA'S LARGEST BROILER EXPORTER, WHILE COMPETITION WITH CHINA INTENSIFIES

Despite instability in the market for grower chicks and depressed prices for broiler meat during most of the year, Thai broiler production in 1992 grew about 8 percent over the previous year. The chick market is starting to settle and broiler prices began to rebound in the first half of 1993. Moderate growth in broiler production is projected for 1993. In 1992, corn and soybean prices were slightly higher than in 1991, but the price of feed purchased from feed mills remained basically unchanged from 1991. Despite unchanging feed prices and depressed chick prices, average production costs for contract farmers in 1992 increased by 6 percent over the previous year's level. The higher production costs can be attributed to rising land, labor, and energy costs. In early 1993, depressed prices for chicks and a relatively mild hot season helped reduce the average production costs for broilers. The mild hot season has helped keep production costs down in 1993 as the mortality rate on broiler farms dropped from 15-25 percent last year to about 10-15 percent in early 1993. In addition, producers have boosted feed efficiency to 2.0-2.1 in early 1993, as opposed to 2.2-2.3 in 1992.

To alleviate the depressed broiler prices in late 1992 and early 1993, the Royal Thai government allocated a no-interest loan of 200 million baht (about $U.S. 8 million) to the Poultry Promotion Association of Thailand to remove live broilers from the market. The government divided the loan into four 50 million baht traunches, with repayment due by December 1993. Under this policy, the Association had to purchase broilers at prevailing market prices, freeze them, and hold them as a buffer stock until prices moved to a target price. After broiler prices rebounded, on 26 May 1993, the Government abolished the remaining two loan traunches (100 million baht) available to the Association as market prices for live broiler were greater than the target price.

Chronic over-production of grower chicks and depressed chick prices in late 1992 and early 1993 led to severe losses being incurred by chick producers over that period. In an effort to reduce their losses, chick producers are cutting back production. In early 1993, chick producers held meetings to control output, and all producers agreed to reduce chick production by 10-20 percent. As result, the market for chicks in Thailand exhibited a much greater degree of stability by mid-1993.

Besides the wildly fluctuating market for chicks, labor and land constraints remain factors potentially limiting further expansion of Thailand's broiler sector. Migration from rural to urban areas continues unabated, resulting in labor shortages in some upcountry regions. As almost all of the Thai broilers are exported in the form of deboned products and fancy cuts, all processing plants rely heavily on skilled labor in the cutting process, and the

availability of low cost labor is crucial to the competitiveness of Thailand's broiler sector. Hence, disruptions in Thailand's labor market can have serious ramifications for its broiler sector. As an example, regional differences in minimum wage regulations are causing some processors to relocate. Besides increasing the cost of labor, Thailand's urbanization and breakneck rate of economic growth has caused land prices to increase rapidly in recent years. The rising real estate prices are having a significant impact on Thai broiler producers' expansion decisions.

Growing domestic demand for broiler products is providing a needed boost for Thailand's broiler sector. Domestic consumption for 1992 increased about 8 percent as prevailing high pork prices caused consumers to substitute chicken for a portion of their normal meat consumption. As a result of soaring pork prices, chicken remains Thailand's most popular meat. Domestic consumption is also partly a function of exports, as the by-products of chicken parts produced for export are consumed locally. Domestic consumption should grow at a slower pace (2-3 percent) in 1993, following slower growth in broiler production and softer pork prices. The average retail price for chicken is currently about half the price of beef and pork.

Although further processed products (including ready-to-serve fast-foods, sausage, etc.) are gaining popularity in large cities, about 90 percent of chicken meat is still purchased in the form of fresh meat in open markets. In an effort to tap into growing domestic demand for further processed products, some integrated processors have diversified operations to include chicken sausage, grilled chicken, chicken meat balls, etc. Fast-food franchises (such as Kentucky Fried Chicken, McDonalds, Burger King, and Pizza Hut) are well accepted by the growing Thai middle class in urban areas. Consequently, Thais are consuming increased levels of chicken outside the home.

Thailand continues to be the largest broiler exporter in Asia. The volume of export sales increased by about 7 percent in 1992, as opposed to 18 percent the year before. Meanwhile, the value of exports increased only one percent due to depressed export prices throughout the year. Average FOB quotations for all destinations dropped 5 percent to approximately $U.S.2,340/ton in 1992. Export prices to Japan dropped sharply from $U.S.2,200-2,300/ton (C&F) for ordinary deboned broilers in early 1992 to $U.S.1,600-1,700/ton (C&F) in the last quarter. The bearish export prices can be attributed to a slowdown in Japan's economy, heavy stocks held by Japanese importers, and fierce competition from China and Brazil in the Japanese market. However, this year's prices began to increase significantly in May 1993 as Japanese importers experienced a decline in Thai broiler supplies. Export prices to Japan during May 1993 were at $U.S.2,400-2,500/ton for ordinary boneless meat and at $U.S.4,000-4,100/ton for Yakitori fancy cuts. Export prices to the EC market have climbed less than those to

THAILAND'S BROILER EXPORT MARKETS, 1988-1992 (1,000 TONS)					
COUNTRY	1988	1989	1990	1991	1992
JAPAN	85.7	90.5	108.1	137.3	145.5
HONG KONG	3.0	5.0	7.4	4.4	5.1
SINGAPORE	4.1	4.1	5.2	4.5	4.1
EC	2.0	6.0	15.5	13.4	14.8
OTHERS	1.0	2.4	2.4	4.5	5.3
TOTAL	95.8	108.0	138.6	164.1	174.8

Japan, from $U.S.1,700-1,800/ton for skinless boneless breast in early 1993 to about $U.S.2,000/ton in June 1993.

The share of total Thai broiler exports going to Japan decreased slightly from 84 percent in 1991 to 83 percent in 1992. The EC accounted for about 9 percent of total broiler exports. Japan purchases mainly deboned breast and thigh meat, but continues to purchase an increasing amount of Thai fancy cuts. Exports to the European market are mostly skinless boneless breast, while the Middle East imports both bone-in leg parts and some whole frozen broilers from Thailand. Singapore and Hong Kong are the other traditional markets for Thai broiler meat. Industry estimates indicate that about 95 percent of the exports in 1992 were deboned parts (ordinary deboned cuts: 30 percent, fancy cuts: 65 percent), with the balance being bone-in leg products and whole chickens.

Thai broiler processors are finding it increasingly difficult to maintain the sharp annual increases in broiler exports sustained during the late 1980s. Thailand's competitive advantage is gradually eroding due to rising costs of production relative to other broiler exporters, especially China and Brazil. In addition, the recent economic downturn in Japan has reduced opportunities in Thailand's largest market. The EC's increasingly protectionist stance is also slowing Thai exports of breast meat to this large potential market. Based on the need to replace stocks and a sanguine outlook for Japan's economy, exports to Japan may increase slightly this year. Meanwhile, the EC's import barriers should cause export sales there to remain essentially unchanged. The EC currently applies an additional levy of approximately $U.S.242/ton in addition to the normal levy of $U.S.1,257/ton on Thai frozen chicken. Given the mounting obstacles to Thailand's export growth potential, Thai broiler exports for 1993 are forecast to grow only slightly over the 1992 level.

Fully aware of the impediments to furthering export growth, Thai broiler processors are aggressively exploring new avenues to expand sales in world markets. Exporting firms are making a strong effort to develop higher value products (especially fancy cuts) for the Japanese market and are concentrating efforts on diversifying sales to new markets. The government, in cooperation with private companies, continues to seek new customers by inviting officials from potential importing countries to observe broiler production and processing facilities in Thailand. The Thai government is still waiting for approval to export to Canada, Australia, and the United Kingdom. Meanwhile, it recently began to seek approval to export to France. The South Korean government reportedly will send veterinarians to investigate Thai processing plants in the future. In addition, Thailand's request for eligibility to export poultry meat to the United States is still being reviewed. They have been advised that only cooked poultry products could be exported to the United States due to the presence of Exotic Newcastles disease in Thailand.

WORLD TURKEY MEAT PRODUCTION AND DISTRIBUTION

Turkey production in reporting countries reached 3.85 million tons in 1992, about 4 percent greater than the previous year. About 91 percent of the world's turkey meat is produced in the EC and the United States. Similarly, about 90 percent of the world's turkey is consumed in the EC and the United States. Turkey production in North America and the EC increased about 4 percent and further increases in these two major producing areas is forecast in 1993. Due to a growing tendency to use turkey meat in further processed products, the turkey consumption in reporting countries increased about 2 percent in 1992. Most of the world's trade in turkey meat occurs in North America and within the EC. France is the largest exporter, followed by the United States, the United Kingdom, and the Netherlands. Trade in turkey meat increased around 27 percent in 1992. The growth in imports and exports of turkey meat was primarily due to an increase level of turkey meat trade within the EC and to higher U.S. exports to Mexico and South Korea.

TURKEY SITUATION AND OUTLOOK IN SELECTED COUNTRIES

FRANCE CONTINUES TO DOMINATE EC TURKEY MEAT MARKET

Driven partially by growing demand within the EC, French turkey meat production increased about 11 percent in 1992. In 1993, however, French turkey production is forecast to grow only 5 percent. In 1992, producer prices continued to decline due to expanded production and dwindling exports to markets outside the EC. Monetary factors and aggressive competition from Brazil and the United States limited third country exports as well. Feed prices also dropped in 1992, enabling producers to lower their cost of production and to maintain profit margins in the midst of depressed turkey product prices. In 1993, the continued vertical integration of France's turkey industry will remain critical to the industry's ability to supply competitively priced turkey meat products.

France's per capita consumption of turkey meat increased only slightly in 1992. Nonetheless, France's consumption of turkey meat is the highest in the European Community. Consumption in France remains relatively high due in part to advances in processing technology made by the French turkey industry. The upshot of the improved technology is products with an increased shelf-life and better packaging. In 1993, the consumption of parts is forecast to increase due to sustained efforts made by the industry to improve overall product quality and to offer a more diversified product line, including oven-ready and microwaveable prepared products. As a result of the anticipated increase in parts consumption, France's total turkey consumption is forecast to increase about 5 percent in 1993.

As of result of strong sales within the EC, the quantity of French turkey meat exports increased about 37 percent in 1992. Exports of fresh carcasses to the Netherlands and Belgium rose significantly, and sales of frozen products to Germany increased as well. Purchasing about 56 percent of France's total turkey exports, Belgium and Germany remained France's top turkey meat customers. While sales to most EC countries grew, shipments to the United Kingdom dropped about 13 percent. French exports of deboned cuts amounted to 128,400 metric tons, accounting for more than 63 percent of total exports. Outside of the EC, the two major markets for French turkey meat remained Austria and Switzerland. Although exports to Switzerland continued to drop (down 29 percent) in 1992, sales in Austria grew 22 percent. Exports to South Korea were stable, while new market opportunities were found in Cuba and South Africa. In 1993, French exports of turkey products are forecast to rise 2 percent in response to growing demand in other EC States.

GERMANY CONTINUES TO RELY HEAVILY ON TURKEY MEAT IMPORTS

Germany's turkey meat output increased about 7 percent in 1992. In addition to higher production, imports grew about 15 percent. Both factors contributed to an accumulation of stocks and falling prices. Price data for the first four months of 1993 indicate a persisting over-supply situation as prices had not yet rebounded.

The German turkey industry, the third largest producer in the EC, specializes in producing heavy turkeys suitable for processing into parts and many other value-added items such as sausages. Practically all whole turkeys and turkey products, regardless of the marketing stage, are produced under contract with slaughter plants and marketed as fresh products within Germany. Competition among western German turkey slaughter plants at the wholesale and retail market levels is extremely limited, as the major German producers market their products, reportedly by gentleman's agreement, only in certain well-defined areas. Prices for turkey meat vary by main marketing region in Germany, and price changes are evidently well coordinated by the industry.

In 1992, turkey meat imports rose 15 percent and comprised about 44 percent of Germany's turkey consumption. Imports of whole turkey carcasses and unprocessed parts/pieces increased by 20 percent, while imports of turkey meat preparations dropped by about 10 percent. The rise in whole turkey carcasses and unprocessed parts was driven by growing demand by processing plants, which import raw meat and convert it to specialty products. EC countries are by far the most important suppliers of imported turkey meat. In 1992, they supplied almost 87 percent of the imports, with France and the Netherlands being the major suppliers. As German processors continue to need meat to supply value-added products to the domestic market,

German imports are forecast to increase about 5 percent in 1993.

MEXICO'S TURKEY IMPORTS AND CONSUMPTION CONTINUE TO CLIMB

Mexico's turkey meat production increased only slightly in 1992, and is forecast to decline in 1993. Mexico's capacity to increase turkey production is hampered by inefficient production practices and high feed costs. In addition, Mexico's turkey products are not price or quality competitive with imported U.S. products. While some processors are trying to develop other products, the majority of Mexico's domestically produced turkey meat is marketed as whole turkeys during the Christmas season. Two leading turkey meat companies continue to have 85-90 percent of total domestic production.

Mexico's turkey consumption increased an incredible 40 percent in 1992 and is forecast to grow another 17 percent in 1993. The availability of inexpensive imported U.S. turkey meat is propelling the growth in consumption. Buying almost exclusively from the United States, Mexico's imports grew about 55 percent in 1992. The high quality and attractive prices of U.S. products should boost imports again in 1993, and an increase of 29 percent is forecast.

Mexican turkey meat producers believe they will be the most negatively affected sector of the Mexican poultry industry with the implementation of the North American Free Trade Agreement (NAFTA). Although these producers are well protected during the first years of the agreement, domestic producers are not competitive with the more efficient U.S. turkey meat industry. As a result, many domestic producers are expected to shift from turkey to broilers or swine production, or shut down operations completely. Turkey meat producers are also dissatisfied with NAFTA provisions pertaining to animal health regulations impeding Mexican exports to the U.S. market. They allege that it was an error to negotiate the elimination of tariff and non-tariff barriers for U.S. uncooked poultry meat products, particularly turkey meat, while the U.S. market remains closed to Mexican suppliers.

THE NETHERLANDS LOOKS TO EXPAND TURKEY EXPORTS TO COUNTRIES OUTSIDE THE EC

While not a major producer, the Netherlands is an active trader of turkey meat. Dutch turkey meat exports consist mainly of parts, which accounted for about 97 percent of total exports in 1992. Most of the parts exports are in the form of deboned meat (about 53 percent in 1992). Germany remained the most prominent importer of Dutch turkey meat, buying about 66 percent of total Dutch exports. Imports of turkey products, including live birds and preparations, increased about 7 percent in 1992.

The imports consisted of deboned meat (43 percent), wings (32 percent), drumsticks (9 percent) and back/necks (5 percent). Almost all Dutch turkey meat imports came from other EC countries.

The Netherlands faces mounting problems in exporting turkey meat to other EC countries due to large internal EC supplies. Accordingly, exporters are expected to put greater emphasis on expanding sales to non-EC markets. This would require Dutch exporters to shift back to frozen meat exports and to squeeze prices as much as possible. Exports to non-EC countries mayreceive lower export subsidies due to the anticipated lower EC grain prices in 1993/94. However, the Dutch industry is not overly concerned about the potential drop in export subsidies as the industry is striving to reduce reliance on export subsidies. The industry feels adjusting to lower export subsidies will make it more competitive once the Uruguay Round of GATT negotiations is completed.

BRAZIL SEEKS TO BOOST DOMESTIC TURKEY CONSUMPTION WHILE EXPORTS GROW

Brazil's turkey production declined slightly in 1992, but is forecast to rebound in 1993. The major factors leading to higher production in 1993 are increased domestic demand and larger exports. Turkey consumption remains highly seasonal in Brazil, with about 80 percent of turkey sales occurring during the pre-Christmas period. In order to overcome this major marketing constraint, the largest turkey producer in Brazil, controlling about 80 percent of turkey production, has invested nearly a half million dollars in a promotional campaign. The goal of the campaign is to increase domestic consumption from the current 58,000 to 80,000 metric tons over a five year period. The campaign, modeled after a similar campaign in the United States, will emphasize the health benefits associated with "white meat" consumption. The marketing effort will also feature further processed turkey products.

Brazilian turkey exports, mostly parts, more than doubled in 1992. Volume reached 12,000 metric tons in 1992 and is forecast to increase another 25 percent in 1992. About 95 percent of Brazilian exports went to Germany and Italy in 1992, but Brazilian exporters are forecast to diversify export markets in the future.

WORLD EGG PRODUCTION AND DISTRIBUTION

Egg production in reporting countries increased about 2 percent in 1992. Production and consumption trends vary by region. Production in North and South America is rising only slightly, while the EC's output continues to exhibit a downward trend. New regulations on battery egg production, increased consumer awareness of food safety issues, and reduced demand will probably cause EC production to continue dropping in the future. Egg production in the FSU and Eastern Europe continues to drop sharply due to the lack of financial resources needed to improve layer stocks, purchase feed supplies, and invest in better production facilities. China continues to lead the world in production of eggs with a commanding 36 percent of the total of reporting countries.

Egg trade declined slightly in 1992. Trade within the EC accounted for about half the world's trade in eggs. The Netherlands continues to be the world's top egg exporter, while Germany is still the number one egg importer.

EGG SITUATION AND OUTLOOK IN SELECTED COUNTRIES

CHINA CONTINUES AS LARGEST PRODUCER AND CONSUMER OF EGGS

Despite almost no growth in layer inventories in 1992, China's egg production rose about 10 percent. As in the broiler sector, China's egg industry is rapidly progressing from primarily backyard production systems to efficient and intensive commercial operations. Improved production facilities combined with the use of quality breeding stock and better feed is responsible for the strong growth in recent years, and should lead to continued expansion of production in the future. China's egg production is forecast to grow another 6 percent in 1993. As a result of China's government encouraging egg production near urban areas, the recent rapid growth in production has led to an oversupply in many major cities. The forces of supply and demand should begin to have a larger effect on China's egg production in the future as Beijing became the last city to remove egg subsidies in late 1992. Prior to removal of the subsidies, contracted farmers were able to purchase subsidized feed, and the State purchased all eggs then sold them at a lower price; thus, market forces had little effect on egg supplies. Commercial production in China is about 88 percent brown eggs, with backyard operations producing almost entirely brown eggs.

Since 1989, China's per capita egg consumption has increased about 29 percent reaching a national average of about 163 eggs in 1992. About 90 percent of production goes to fresh egg consumption, less than 1 percent is exported, and the remainder is used in

the processing industry. China's egg consumption is forecast to grow another 5 percent in 1992 in response to the continued growing domestic demand for fresh eggs.

FRANCE'S EGG INDUSTRY NOT EXPECTED TO EXPAND IN THE FUTURE

France, the largest egg producer in the EC, increased egg production only slightly in 1992, reflecting weak domestic and export demand. No resurgence in demand is expected in the future, and France's egg production is forecast to remain flat in the next two years. France's egg production continues to be affected by EC regulations governing proper methods for rearing layers. After growing public complaints regarding animal welfare, the EC adopted regulations regarding the management of caged layers in 1986. The regulations, which set parameters for cage space, height, floor slope, and feeding and watering equipment, have been denounced by French poultry producers as raising production costs, exposing the birds to more severe weather conditions, and making the birds more susceptible to disease. However, the poultry industry has used these perceived "good management procedures" to market eggs as "idyllic country products." In 1992, this marketing strategy resulted in a very positive response among consumers who were willing to pay higher prices for eggs. Nevertheless, the debate remains on what the impact of the presumed improvement in animal welfare will have on EC egg producers' competitive position relative to producers not subject to similar constraints.

Due to growing egg product sales, France's total egg exports increased about 15 percent in 1992. While egg product sales grew, shell egg exports declined about 8 percent in volume and 12 percent in value. Most of the drop was caused by reduced sales to Italy, France's main market for shell eggs. Shell egg exports to Germany, Belgium and the Netherlands remained stable. Due primarily to increased sales to the United Kingdom, exports of dried egg products increased 23 percent in 1992. French exports of yolk products went mainly to Italy (56 percent of total sales value), while Germany and Spain each accounted for about 12 percent of total sales value. French exports of egg whites increased 12 percent in value, going primarily to the United Kingdom. No growth is forecast in France's exports during 1993 due to depressed demand within the EC.

HONG KONG CONTINUES TO BE A VIBRANT MARKET FOR EGGS

Hong Kong is an insignificant producer of eggs, but one of the world's largest importers. Most egg imports come from China, but China's market share has been dropping in recent years. Of Hong Kong's total egg consumption, Chinese eggs equaled 35 percent in 1992 as opposed to 50 percent as

recently as 1989. Meanwhile, U.S. market share increased from 13 percent in 1990 to 25 percent in 1992. Eggs from the EC accounted for 22 percent of domestic consumption in 1992. Brown eggs still account for the bulk (80 to 90 percent) of Hong Kong's total domestic fresh egg consumption. The majority of the population is said to prefer eggs from China due to lower prices, better taste, and darker color. White eggs are generally consumed only in hotels, non-Chinese restaurants, and fast food outlets. Traders point out that Chinese and Thai browns are preferred by Chinese restaurants.

Fresh egg imports in 1992 totalled 1,394 million pieces, a 4 percent drop from 1991's 1,451 million. China continued to top the list of suppliers of fresh eggs with the United States rapidly catching up. China will remain the number one supplier of fresh eggs to Hong Kong in 1993, despite a drop in market share in recent years. The United States, which overtook the Netherlands to become the second largest supplier in 1991, is expected to make further advances in 1993. The availability of Export Enhancement Program bonuses on sales to Hong Kong, and the improved packaging of U.S. brown eggs continue to make U.S. eggs extremely attractive in Hong Kong's market. Due to the fierce competition from China and United States, imports from the EC are forecast to remain at the 1992 level. The Hong Kong market will remain largely a brown egg market, although the increasing number of fast-food outlets and hotels will boost demand for white eggs. Overall demand for eggs in Hong Kong is expected to continue growing, and Hong Kong's imports are forecast to increase about 7 percent in 1993.

THE NETHERLANDS EGG EXPORTS SUFFER DUE TO DECLINING SALES WITHIN THE EC

Egg production in the Netherlands, the world's largest egg exporter, declined about 3 percent in 1992. The drop in consumption is consistent with the reported 4 percent decline in the number of producers. Some producers were forced to exit the industry in 1992 as a 11 percent decline in producer prices squeezed profit margins. Based on recent weak price trends, increased culling of hens, and fewer layer hen eggs being incubated, Dutch egg production is forecast to decline about 6 percent in 1993.

The Netherlands total egg exports in 1992 declined about 6 percent, with fresh eggs and egg product sales declining 8 and 6 percent, respectively. Moreover, the average export price for fresh eggs was 10 percent lower than prices received in 1991. The share of exports going to other EC countries dropped from 86 percent in 1991 to 73 percent in 1992. Germany remained by far the most prominent buyer of Dutch eggs, purchasing about 60 percent of total Dutch egg exports. Exports of fresh table eggs to non-EC member countries increased about 14 percent. The major gains were recorded in exports to Hong Kong, up 14 percent;

Poland, up 50 percent; Oman, up 10 percent; and to Kuwait, where exports more than tripled. With continued depressed demand for eggs within the EC, Dutch egg exports are forecast to fall in 1993.

JAPAN'S DEMAND FOR EGG PRODUCTS DWINDLES

The number of layers in Japan increased about 3 percent in 1992. The increased layer numbers translated into a 3 percent jump Japan's total egg production in 1992. The higher egg output led to significantly lower prices. In 1992, farm gate egg prices fell an average 35 percent, and retail prices dropped about 26 percent in the Tokyo market. Despite prevailing low prices, the current high level of egg production is expected to last throughout 1993. Farmers groups' attempts to cut production by assigning production quotas appear to have failed as egg output shows no indication of slackening.

Direct egg consumption at the household level accounts for roughly 80 percent of total egg use in Japan, with the remainder used by egg processing industries. The severe plunge of egg prices has led to an increase in the consumption of table eggs, which grew by about 15 percent in 1992. The food service sector also shifted to foods requiring eggs to take advantage of the low egg prices. In 1993, table egg consumption is forecast to increase only marginally as the current low price of eggs is unlikely to stimulate further the already high level of egg consumption. In contrast to the growth in table egg consumption, the processed egg sector suffered a slight decline in 1992 after the impressive double-digit growth enjoyed during the previous years. Depressed demand from the bakery/confectionery industry caused the decline in demand for egg products. Consumers were apparently hesitant to purchase costly dessert items. The future performance of the processed egg sector will depend on the pace of Japan's economic recovery.

The demand for imported eggs and egg products declined sharply in 1992, and imports fell about 30 percent. In 1991, supply was short and imports increased to fulfill industry demands for foods using processed egg products, which had expanded with the growth of the food industry. In contrast, last year's domestic egg production was up, while demand from egg processors stagnated. Thus, the demand for imports was low, and imports of processed eggs nose-dived from 65,000 tons in 1991 to 46,000 tons in 1992. Of total eggs imported in 1992, 99 percent were used in the processing sector, and dried/frozen albumen and yolks comprised about 81 percent of total egg imports. Brazil was the largest supplier of frozen albumen followed by the United States. The United States was also the second largest supplier of dried albumen, with the EC having the greatest market share in 1992. The United States was the dominant supplier of egg yolks, accounting for 62 percent of the total egg yolk imports. Egg imports during 1993 are expected to remain flat as

domestic production is forecast to increase while demand for egg products is expected to remain sluggish.

TOTAL POULTRY MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	659	701	708	707	730	752
MEXICO	635	700	840	990	1,090	1,140
UNITED STATES	9,931	10,645	11,204	11,885	12,419	12,940
SUBTOTAL	11,225	12,046	12,752	13,582	14,239	14,832
CENTRAL/SOUTH AMERICA						
GUATEMALA	54	57	61	73	83	90
ARGENTINA	315	335	430	590	605	620
BRAZIL	2,139	2,416	2,691	2,932	3,165	3,400
VENEZUELA	253	225	313	333	350	361
SUBTOTAL	2,761	3,033	3,495	3,928	4,203	4,471
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	179	181	181	189	188	187
DENMARK	128	131	137	158	163	170
FRANCE	1,550	1,651	1,759	1,910	2,020	2,030
GERMANY	603	599	574	604	630	650
GREECE	154	160	160	175	168	168
IRELAND	78	81	83	84	86	87
ITALY	1,025	1,069	1,051	1,057	1,065	1,065
NETHERLANDS	491	526	547	577	570	585
PORTUGAL	207	213	234	237	242	243
SPAIN	831	836	875	867	874	874
UNITED KINGDOM	1,300	1,310	1,360	1,511	1,554	1,595
SUBTOTAL	6,546	6,757	6,961	7,369	7,560	7,654
OTHER WESTERN EUROPE						
AUSTRIA	75	78	83	88	91	93
FINLAND	31	33	37	36	34	36
SUBTOTAL	106	111	120	124	125	129
EASTERN EUROPE						
BULGARIA	188	182	100	95	90	85
HUNGARY	420	426	320	320	320	330
POLAND	348	328	320	336	310	340
ROMANIA	365	425	280	190	160	150
SUBTOTAL	1,321	1,361	1,020	941	880	905
FSU-12	3,233	3,169	3,023	2,706	2,517	2,428
BALTIC STATES	125	118	115	101	96	90
SUBTOTAL	3,358	3,287	3,138	2,807	2,613	2,518
MIDDLE EAST						
ISRAEL	171	173	188	206	216	222
SAUDI ARABIA	240	265	285	303	318	337
TURKEY	254	269	284	330	335	340
UNITED ARAB EMIRATES	14	14	14	15	15	17
SUBTOTAL	679	721	771	854	884	916
AFRICA						
EGYPT	254	235	225	275	275	280
SOUTH AFRICA, REP OF	637	697	731	752	735	740
SUBTOTAL	891	932	956	1,027	1,010	1,020
ASIA						
CHINA (PRC)	2,820	3,229	3,952	4,540	5,100	5,600
HONG KONG	34	32	29	21	21	20
JAPAN	1,423	1,391	1,357	1,367	1,355	1,350
KOREA, REPUBLIC OF	243	269	324	354	368	380
PHILLIPPINES	263	279	287	310	329	335
SINGAPORE	58	56	58	57	57	58
TAIWAN	462	476	480	531	545	555
THAILAND	553	595	655	710	735	780
SUBTOTAL	5,856	6,327	7,142	7,890	8,510	9,078
OCEANIA						
AUSTRALIA	406	419	425	455	470	485
SUBTOTAL	406	419	425	455	470	485
TOTAL	33,149	34,994	36,780	38,977	40,494	42,008

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	698	738	751	764	791	808
MEXICO	684	741	925	1,101	1,218	1,274
UNITED STATES	9,523	10,048	10,565	11,079	11,521	11,987
SUBTOTAL	10,905	11,527	12,241	12,944	13,530	14,069
CENTRAL/SOUTH AMERICA						
GUATEMALA	54	57	60	84	89	95
ARGENTINA	324	331	437	630	635	680
BRAZIL	1,891	2,111	2,364	2,542	2,790	3,075
VENEZUELA	253	203	290	311	316	339
SUBTOTAL	2,522	2,702	3,151	3,567	3,830	4,189
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	161	158	159	166	166	166
DENMARK	63	60	68	78	59	63
FRANCE	1,147	1,221	1,264	1,335	1,415	1,400
GERMANY	885	885	905	1,044	1,070	1,085
GREECE	162	168	171	185	179	179
IRELAND	81	85	86	86	89	92
ITALY	1,050	1,083	1,069	1,078	1,083	1,084
NETHERLANDS	207	256	295	304	340	347
PORTUGAL	208	214	237	231	239	240
SPAIN	895	905	941	941	945	950
UNITED KINGDOM	1,320	1,375	1,409	1,582	1,602	1,629
SUBTOTAL	6,179	6,410	6,604	7,030	7,187	7,235
OTHER WESTERN EUROPE						
AUSTRIA	92	93	98	103	106	109
FINLAND	31	33	36	37	36	36
SUBTOTAL	123	126	134	140	142	145
EASTERN EUROPE						
BULGARIA	168	170	175	175	175	175
HUNGARY	243	235	240	240	225	230
POLAND	335	311	318	348	333	359
ROMANIA	254	463	318	318	240	218
SUBTOTAL	1,000	1,179	1,051	1,081	973	982
FSU-12	3,484	3,480	3,192	2,777	2,619	2,531
BALTIC STATES	84	84	78	73	72	65
SUBTOTAL	3,568	3,564	3,270	2,850	2,691	2,596
MIDDLE EAST						
ISRAEL	144	159	175	195	202	208
SAUDI ARABIA	424	445	516	546	564	587
TURKEY	252	268	283	325	335	340
UNITED ARAB EM.	40	41	54	56	58	60
SUBTOTAL	860	913	1,028	1,122	1,159	1,195
AFRICA						
EGYPT	279	237	227	280	290	300
SOUTH AFRICA, REP O F	546	568	565	763	740	750
SUBTOTAL	825	805	792	1,043	1,030	1,050
ASIA						
CHINA (PRC)	2,795	3,187	3,915	4,460	5,010	5,505
HONG KONG	183	195	214	263	268	265
JAPAN	1,697	1,689	1,688	1,752	1,755	1,760
KOREA, REPUBLIC OF	243	274	292	373	393	410
PHILLIPPINES	255	283	292	307	331	350
SINGAPORE	96	94	101	101	101	103
TAIWAN	459	471	475	526	540	549
THAILAND	442	451	486	530	545	570
SUBTOTAL	6,170	6,644	7,463	8,312	8,943	9,512
OCEANIA						
AUSTRALIA	406	417	423	451	463	477
SUBTOTAL	406	417	423	451	463	477
TOTAL	32,558	34,287	36,157	38,540	39,948	41,450

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	7	6	12	8	7	7
UNITED STATES	398	554	631	772	901	951
SUBTOTAL	405	560	643	780	908	958
SOUTH AMERICA						
ARGENTINA	0	4	1	0	6	0
BRAZIL	248	305	327	390	375	410
VENEZUELA	0	22	22	15	15	20
SUBTOTAL	248	331	350	405	396	430
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	65	77	89	88	93	94
DENMARK	71	79	77	92	118	123
FRANCE	474	497	559	660	720	750
GERMANY	52	64	59	60	60	65
GREECE	3	4	2	4	3	3
IRELAND	5	4	5	5	5	4
ITALY	20	30	31	30	33	33
NETHERLANDS	365	383	395	443	440	455
PORTUGAL	3	5	7	11	12	12
SPAIN	6	4	7	7	7	6
UNITED KINGDOM	64	91	101	120	124	128
SUBTOTAL	1128	1238	1332	1520	1615	1673
INTRA EC TRADE	695	799	790	997	1035	1047
EASTERN EUROPE						
BULGARIA	30	30	0	0	0	0
HUNGARY	174	189	145	100	95	100
POLAND	18	21	16	13	12	11
ROMANIA	120	0	0	0	0	0
SUBTOTAL	342	240	161	113	107	111
MIDDLE EAST						
ISRAEL	18	19	18	12	14	16
SAUDI ARABIA	2	1	2	4	5	8
TURKEY	2	1	1	1	1	1
SUBTOTAL	22	21	21	17	20	25
AFRICA						
SO. AFRICA, REP OF	11	1	1	3	5	0
ASIA						
CHINA (PRC)	94	110	123	158	195	220
HONG KONG	49	75	95	109	112	116
SINGAPORE	10	11	12	10	8	10
TAIWAN	4	5	5	5	5	6
THAILAND	111	144	169	180	190	210
SUBTOTAL	268	345	458	462	510	562
OCEANIA						
AUSTRALIA	1	2	2	4	7	8
SUBTOTAL	1	2	2	4	7	8
TOTAL	2,425	2,738	2,968	3,304	3,568	3,767
TOTAL (EXCL INTRA-EC TRADE)	1,730	1,939	2,178	2,307	2,533	2,720

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	42	53	56	62	61	65
MEXICO	51	46	90	116	128	134
SUBTOTAL	93	99	146	178	189	199
SOUTH AMERICA						
ARGENTINA	1	0	2	42	42	60
SUBTOTAL	1	0	2	42	42	60
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	47	54	67	65	71	73
DENMARK	6	8	8	12	14	16
FRANCE	71	67	64	85	115	120
GERMANY	334	350	356	500	500	500
GREECE	11	12	13	14	14	14
IRELAND	8	8	8	7	8	9
ITALY	45	44	49	51	51	52
NETHERLANDS	81	113	143	170	210	217
PORTUGAL	4	6	6	5	9	9
SPAIN	70	73	73	81	78	82
UNITED KINGDOM	84	156	150	191	172	162
SUBTOTAL	761	891	937	1181	1242	1254
INTRA-EC TRADE	695	799	790	997	1035	1047
OTHER WESTERN EUROPE						
AUSTRIA	17	15	15	15	15	16
SUBTOTAL	17	15	15	15	15	16
FSU-12	210	244	130	45	65	71
SUBTOTAL	210	244	130	45	65	71
EASTERN EUROPE						
POLAND	5	1	14	40	25	25
ROMANIA	7	48	32	32	48	55
SUBTOTAL	12	49	46	72	73	80
MIDDLE EAST						
SAUDI ARABIA	194	209	245	250	253	253
UNITED ARAB EMIR.	54	54	61	65	64	65
SUBTOTAL	248	263	306	315	317	318
AFRICA						
EGYPT	25	2	2	5	15	15
SO. AFRICA, REP OF	5	6	8	14	10	10
SUBTOTAL	30	8	10	19	25	25
ASIA						
CHINA (PRC)	49	68	86	78	105	125
HONG KONG	198	239	280	352	360	361
JAPAN	281	301	358	406	410	415
SINGAPORE	48	52	52	57	52	55
KOREA, REPUBLIC OF	10	15	15	19	25	30
SUBTOTAL	586	675	791	912	952	986
TOTAL	1,958	2,244	2,383	2,779	2,920	3,009
TOTAL (EXCL INTRA-EC TRADE)	1,263	1,445	1,593	1,782	1,885	1,962

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	539	572	577	575	605	620
MEXICO	590	660	790	940	1,030	1,080
UNITED STATES	7,814	8,360	8,886	9,483	9,990	10,473
SUBTOTAL	8,943	9,592	10,253	10,998	11,625	12,173
SOUTH AMERICA						
ARGENTINA	300	305	415	570	590	600
BRAZIL	2,084	2,356	2,628	2,872	3,100	3,325
VENEZUELA	252	224	313	333	350	361
SUBTOTAL	2,636	2,885	3,356	3,775	4,040	4,286
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	144	147	156	165	164	163
DENMARK	110	116	121	137	144	150
FRANCE	898	959	995	1,110	1,200	1,200
GERMANY	355	334	316	344	350	350
GREECE	136	129	130	144	140	140
IRELAND	40	40	42	43	44	44
ITALY	608	632	615	628	630	630
NETHERLANDS	406	433	454	478	467	480
PORTUGAL	178	182	200	206	210	211
SPAIN	772	766	810	798	810	806
UNITED KINGDOM	770	798	935	941	970	996
SUBTOTAL	4,417	4,536	4,774	4,994	5,129	5,170
OTHER WESTERN EUROPE						
AUSTRIA	59	60	62	64	66	67
FINLAND	27	28	32	31	29	31
SUBTOTAL	86	88	94	95	95	98
EASTERN EUROPE						
HUNGARY	330	290	215	200	210	215
POLAND	210	180	170	168	156	172
ROMANIA	290	400	260	175	145	130
SUBTOTAL	830	870	645	543	511	517
FSU-12	1,750	1,735	1,685	1,300	1,190	1,150
BALTIC STATES	70	65	65	50	45	42
SUBTOTAL	1,820	1,800	1,750	1,350	1,235	1,192
MIDDLE EAST						
ISRAEL	115	121	128	138	142	146
SAUDI ARABIA	240	263	275	292	308	326
TURKEY	180	260	275	320	325	330
SUBTOTAL	535	644	678	750	775	802
AFRICA						
EGYPT	195	185	170	220	225	230
SOUTH AFRICA, REP OF	525	585	620	640	625	630
SUBTOTAL	720	770	790	860	850	860
ASIA						
CHINA (PRC)	1,210	1,400	1,745	2,025	2,300	2,550
HONG KONG	23	22	20	17	16	15
JAPAN	1,300	1,272	1,243	1,252	1,240	1,235
THAILAND	538	575	630	680	700	740
SINGAPORE	48	45	48	46	46	47
TAIWAN	351	362	375	413	425	435
SUBTOTAL	3,470	3,676	4,061	4,433	4,727	5,022
OCEANIA						
AUSTRALIA	365	377	383	410	423	437
SUBTOTAL	365	377	383	410	423	437
TOTAL	23,822	25,238	26,784	28,208	29,410	30,557

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	579	613	625	635	660	675
MEXICO	633	694	845	1,009	1,104	1,154
UNITED STATES	7,444	7,847	8,310	8,809	9,201	9,643
SUBTOTAL	8,656	9,154	9,780	10,453	10,965	11,472
SOUTH AMERICA						
ARGENTINA	309	301	422	610	638	660
BRAZIL	1,840	2,056	2,306	2,494	2,740	3,020
VENEZUELA	252	202	290	315	326	346
SUBTOTAL	2,401	2,559	3,018	3,419	3,704	4,026
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	134	126	127	120	121	120
DENMARK	51	49	50	59	62	65
FRANCE	599	649	639	749	825	810
GERMANY	532	544	566	556	605	590
GREECE	140	136	136	154	150	151
IRELAND	45	45	47	47	49	50
ITALY	631	650	636	646	647	647
NETHERLANDS	178	197	202	209	217	225
PORTUGAL	180	184	197	202	206	208
SPAIN	823	813	851	850	857	857
UNITED KINGDOM	816	856	990	1,006	1,052	1,066
SUBTOTAL	4,129	4,249	4,441	4,598	4,791	4,789
OTHER WESTERN EUROPE						
AUSTRIA	62	62	63	66	68	69
FINLAND	27	28	31	33	33	34
SUBTOTAL	89	90	94	99	101	103
EASTERN EUROPE						
HUNGARY	218	210	190	147	150	158
POLAND	215	179	182	190	186	198
ROMANIA	211	435	296	296	217	198
SUBTOTAL	644	824	668	633	553	554
FSU-12	1,983	1,963	1,836	1,365	1,268	1,216
BALTIC STATES	36	37	34	25	27	26
SUBTOTAL	2,019	2,000	1,870	1,390	1,295	1,242
MIDDLE EAST						
ISRAEL	104	110	116	134	139	143
SAUDI ARABIA	420	442	480	534	554	576
TURKEY	175	259	274	315	325	330
SUBTOTAL	699	811	870	983	1,018	1,049
AFRICA						
EGYPT	215	187	170	225	240	240
SO. AFRICA, REP OF	470	496	508	647	627	637
SUBTOTAL	685	683	678	872	867	877
ASIA						
CHINA (PRC)	1,466	1,749	1,734	1,963	2,235	2,475
HONG KONG	148	157	172	210	214	210
JAPAN	1,564	1,560	1,563	1,624	1,627	1,632
SINGAPORE	85	81	91	89	89	91
TAIWAN	351	362	375	397	413	415
THAILAND	430	436	466	505	520	540
SUBTOTAL	4,044	4,345	4,401	4,788	5,098	5,363
OCEANIA						
AUSTRALIA	365	375	381	406	416	429
SUBTOTAL	365	375	381	406	416	429
TOTAL	23,731	25,090	26,201	27,641	28,808	29,904

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	1	1	5	1	2	2
UNITED STATES	369	518	572	675	789	832
SUBTOTAL	370	519	577	676	791	834
SOUTH AMERICA						
ARGENTINA	0	4	1	0	6	0
BRAZIL	244	300	322	378	360	390
VENEZUELA	0	22	22	19	25	24
SUBTOTAL	244	326	345	397	391	414
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	35	48	62	80	80	81
DENMARK	60	70	76	81	86	90
FRANCE	349	358	401	429	440	460
GERMANY	28	35	31	80	50	50
GREECE	2	2	2	2	2	2
IRELAND	3	3	3	3	3	3
ITALY	7	10	10	11	12	12
NETHERLAND	265	286	317	355	370	380
PORTUGAL	1	3	5	7	8	8
SPAIN	5	3	6	4	5	4
UNITED KINGDOM	26	27	35	35	38	40
SUBTOTAL	781	845	948	1,087	1,094	1,130
INTRA-EC TRADE	436	494	526	568	622	618
EASTERN EUROPE						
ROMANIA	85	65	50	0	0	0
HUNGARY	96	95	74	55	55	60
SUBTOTAL	181	160	124	55	55	60
MIDDLE EAST						
ISRAEL	14	11	10	4	4	4
SAUDI ARABIA	2	2	5	4	5	8
TURKEY	2	1	1	1	1	1
SUBTOTAL	18	14	16	9	10	13
AFRICA						
SO. AFRICA, REP OF	11	1	1	3	5	0
SUBTOTAL	11	1	1	3	5	0
ASIA						
CHINA (PRC)	83	86	93	110	125	140
HONG KONG	47	72	94	104	107	109
SINGAPORE	10	11	11	10	8	10
THAILAND	108	139	164	175	180	200
SUBTOTAL	248	308	362	399	420	459
OCEANIA						
AUSTRALIA	1	2	2	4	7	8
SUBTOTAL	1	2	2	4	7	8
TOTAL	1,843	2,174	2,374	2,627	2,768	2,918
TOTAL (EXCL INTRA-EC TRADE)	1,407	1,680	1,848	2,059	2,146	2,300

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICE

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	39	49	51	57	61	65
MEXICO	45	39	60	74	74	74
SUBTOTAL	84	88	111	131	135	139
SOUTH AMERICA						
ARGENTINA	1	0	2	42	60	60
SUBTOTAL	1	0	2	42	60	60
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	25	27	33	35	37	38
DENMARK	1	3	5	3	4	5
FRANCE	50	48	45	68	65	70
GERMANY	205	245	281	292	305	290
GREECE	6	9	8	12	12	13
IRELAND	8	8	8	7	8	9
ITALY	30	28	31	29	29	29
NETHERLANDS	37	50	65	86	120	125
PORTUGAL	3	5	2	3	4	5
SPAIN	56	50	48	56	52	56
UNITED KINGDOM	72	85	90	100	120	110
SUBTOTAL	493	558	616	691	756	750
INTRA EC-TRADE	436	494	526	568	622	618
OTHER WESTERN EUROPE						
AUSTRIA	3	2	2	2	2	2
SUBTOTAL	3	2	2	2	2	2
FSU-12	199	200	120	40	60	50
SUBTOTAL	199	200	120	40	60	50
EASTERN EUROPE						
ROMANIA	5	5	20	30	46	55
SUBTOTAL	5	5	20	30	46	55
MIDDLE EAST						
SAUDI ARABIA	194	209	204	249	253	252
SUBTOTAL	194	209	204	249	253	252
AFRICA						
EGYPT	20	2	2	5	15	15
SO. AFRICA, REP OF	1	3	2	10	7	7
SUBTOTAL	21	5	4	15	22	22
ASIA						
CHINA (PRC)	49	65	82	105	120	130
HONG KONG	172	208	246	300	305	303
JAPAN	271	291	347	393	397	402
SINGAPORE	47	50	51	56	51	54
SUBTOTAL	539	614	726	854	873	889
TOTAL	1,539	1,681	1,805	2,054	2,207	2,219
TOTAL (EXCL INTRA-EC TRADE)	1,103	1,187	1,279	1,486	1,585	1,601

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

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FOREIGN AGRICULTURAL SERVICE

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	120	129	131	132	125	132
MEXICO	9	8	12	13	10	8
UNITED STATES	1,876	2,048	2,088	2,167	2,197	2,233
SUBTOTAL	2,005	2,185	2,231	2,312	2,332	2,373
SOUTH AMERICA						
BRAZIL	55	60	63	60	65	75
SUBTOTAL	55	60	63	60	65	75
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	6	4	4	4	4	4
DENMARK	3	3	4	5	6	7
FRANCE	387	432	487	539	565	570
GERMANY	118	145	149	159	169	169
GREECE	3	3	3	3	3	3
IRELAND	16	16	16	16	16	16
ITALY	257	279	273	269	275	275
NETHERLANDS	27	30	32	34	36	35
PORTUGAL	29	30	33	30	31	31
SPAIN	21	29	27	22	23	23
UNITED KINGDOM	230	223	242	246	249	255
SUBTOTAL	1,097	1,194	1,270	1,327	1,377	1,388
EASTERN EUROPE						
POLAND	15	15	15	15	16	17
SUBTOTAL	15	15	15	15	16	17
FSU-12	120	90	75	65	60	50
SUBTOTAL	120	90	75	65	60	50
MIDDLE EAST						
ISRAEL	56	52	60	68	74	76
SUBTOTAL	56	52	60	68	74	76
TOTAL	3,348	3,596	3,714	3,847	3,924	3,979

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	119	125	126	129	131	133
MEXICO	14	15	41	58	68	72
UNITED STATES	1,863	1,992	2,060	2,086	2,115	2,118
SUBTOTAL	1,996	2,132	2,227	2,273	2,314	2,323
SOUTH AMERICA						
BRAZIL	51	55	58	48	55	55
SUBTOTAL	51	55	58	48	55	55
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	18	19	22	26	27	28
DENMARK	4	6	7	9	11	12
FRANCE	301	315	342	339	360	360
GERMANY	172	208	240	272	286	290
GREECE	4	4	5	4	6	5
IRELAND	14	14	14	14	14	14
ITALY	256	272	265	268	272	273
NETHERLANDS	19	27	29	33	36	36
PORTUGAL	29	30	35	30	33	35
SPAIN	31	44	40	29	31	31
UNITED KINGDOM	210	211	236	228	232	238
SUBTOTAL	1,058	1,150	1,235	1,252	1,308	1,322
EASTERN EUROPE						
POLAND	15	13	16	18	19	20
SUBTOTAL	15	13	16	18	19	20
FSU-12	120	92	75	72	60	50
SUBTOTAL	120	92	75	72	60	50
MIDDLE EAST						
ISRAEL	44	44	46	61	63	65
SUBTOTAL	44	44	46	61	63	65
TOTAL	3,284	3,486	3,657	3,724	3,819	3,835

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	6	5	7	7	5	5
UNITED STATES	19	24	47	78	85	92
SUBTOTAL	25	29	54	85	90	97
SOUTH AMERICA						
BRAZIL	4	5	5	12	15	20
SUBTOTAL	4	5	5	12	15	20
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	5	7	7	8	9	11
DENMARK	1	0	1	1	1	1
FRANCE	95	123	150	205	210	215
GERMANY	11	14	14	8	10	12
GREECE	0	0	0	1	0	0
IRELAND	3	3	3	3	3	3
ITALY	12	17	19	17	19	19
NETHERLANDS	25	28	32	32	33	34
SPAIN	0	0	0	0	0	0
UNITED KINGDOM	30	33	29	38	39	41
SUBTOTAL	182	225	255	313	324	336
INTRA-EC TRADE	132	170	192	211	222	232
MIDDLE EAST						
ISRAEL	10	8	8	2	3	4
SUBTOTAL	10	8	8	2	3	4
TOTAL	221	267	322	412	432	457
TOTAL (EXCL INTRA EC-TRADE)	89	97	130	201	210	225

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	3	4	5	5	5	5
MEXICO	5	7	29	45	58	64
SUBTOTAL	8	11	34	50	63	69
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	17	22	25	30	32	35
DENMARK	2	3	4	5	6	6
FRANCE	9	6	5	5	5	5
GERMANY	65	77	105	121	127	133
GREECE	1	1	2	2	3	2
IRELAND	1	1	1	1	1	1
ITALY	11	10	11	16	16	17
NETHERLANDS	17	25	29	31	33	35
PORTUGAL	0	0	2	0	1	4
SPAIN	10	15	13	7	8	8
UNITED KINGDOM	10	21	23	20	22	24
SUBTOTAL	143	181	220	238	254	270
INTRA-EC TRADE	132	170	192	211	222	232
FSU-12	0	2	0	2	2	2
SUBTOTAL	0	2	0	2	2	2
ASIA						
SOUTH KOREA, REP OF	0	6	11	15	17	20
SUBTOTAL	0	6	11	15	17	20
TOTAL	151	200	265	305	336	361
TOTAL (EXCL INTRA EC-TRADE)	19	30	73	94	114	129

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG PRODUCTION

SELECTED COUNTRIES
(MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	5,719	5,661	5,666	5,614	5,560	5,550
MEXICO	17,950	18,040	19,840	19,650	20,140	20,450
UNITED STATES	67,178	67,987	69,352	70,592	71,206	71,880
SUBTOTAL	90,847	91,688	94,858	95,856	96,906	97,880
SOUTH AMERICA						
ARGENTINA	3,350	3,900	4,550	3,900	3,400	3,400
BRAZIL	12,174	13,454	13,655	14,190	13,340	14,000
VENEZUELA	2,600	1,146	1,928	2,353	2,252	2,320
SUBTOTAL	18,124	18,500	20,133	20,443	18,992	19,720
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	2,724	2,941	3,134	3,196	3,203	3,208
DENMARK	1,410	1,409	1,435	1,440	1,300	1,300
FRANCE	15,050	14,629	15,300	15,400	15,500	15,500
GERMANY	17,794	16,800	15,525	15,165	14,700	14,800
GREECE	2,507	2,566	2,514	2,495	2,540	2,500
IRELAND	640	640	640	640	600	600
ITALY	11,223	11,454	11,568	11,454	11,470	11,470
NETHERLANDS	10,660	10,801	10,762	10,389	9,750	10,000
PORTUGAL	1,520	1,590	1,671	1,814	1,840	1,860
SPAIN	10,140	10,659	10,184	8,675	8,985	9,000
UNITED KINGDOM	10,547	10,658	11,006	10,699	10,680	10,720
SUBTOTAL	84,215	84,147	83,739	81,367	80,568	80,958
OTHER WESTERN EUROPE						
AUSTRIA	1,695	1,664	1,691	1,690	1,700	1,700
FINLAND	1,288	1,232	1,077	1,087	1,120	1,120
SUBTOTAL	2,983	2,896	2,768	2,777	2,820	2,820
EASTERN EUROPE						
HUNGARY	4,250	4,300	4,100	4,000	3,900	3,800
POLAND	8,200	7,649	6,500	6,300	6,200	6,300
ROMANIA	7,600	7,100	6,900	6,700	5,450	5,600
SUBTOTAL	20,050	19,049	17,500	17,000	15,550	15,700
FSU-12	82,051	79,086	77,265	68,230	62,300	60,375
BALTIC STATES	2,821	2,639	2,560	2,040	1,900	1,900
SUBTOTAL	84,872	81,725	79,825	70,270	64,200	62,275
MIDDLE EAST						
ISRAEL	1,898	1,843	1,797	1,901	1,952	2,005
SAUDI ARABIA	2,800	2,900	2,863	2,850	2,915	2,975
TURKEY	7,200	7,500	7,300	7,800	8,100	8,100
SUBTOTAL	11,898	12,243	11,960	12,551	12,967	13,080
AFRICA						
EGYPT	3,000	3,200	3,000	3,050	3,100	3,000
SUBTOTAL	3,000	3,200	3,000	3,050	3,100	3,000
ASIA						
CHINA (PRC)	140,900	158,920	185,000	203,980	215,000	225,000
HONG KONG	34	34	33	21	20	20
JAPAN	40,356	40,318	41,638	42,911	43,100	42,800
KOREA, REPUBLIC OF	6,919	7,145	7,770	7,750	8,200	8,800
TAIWAN	4,450	4,500	4,806	5,146	5,450	5,350
SUBTOTAL	192,659	210,917	239,247	259,808	271,770	281,970
OCEANIA						
AUSTRALIA	3,286	3,468	3,540	3,710	3,784	3,800
SUBTOTAL	3,286	3,468	3,540	3,710	3,784	3,800
TOTAL	511,934	527,833	556,570	566,832	570,657	581,203

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TABLE EGG CONSUMPTION

SELECTED COUNTRIES
(IN MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	4,435	4,300	4,280	4,280	4,220	4,200
MEXICO	16,233	16,281	17,839	17,839	17,674	18,141
UNITED STATES	47,708	46,696	46,139	46,078	45,844	45,820
SUBTOTAL	68,376	67,277	68,258	68,197	67,738	68,161
SOUTH AMERICA						
ARGENTINA	3,050	3,100	3,750	2,817	2,205	2,155
BRAZIL	12,174	13,450	13,635	13,635	14,178	14,725
VENEZUELA	2,325	1,030	1,829	2,218	2,089	2,175
SUBTOTAL	17,549	17,580	19,214	18,670	18,472	19,055
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	2,165	2,337	2,446	2,468	2,465	2,462
DENMARK	1,375	1,364	1,412	1,464	1,298	1,298
FRANCE	15,806	14,989	15,490	15,520	15,630	15,650
GERMANY	21,615	20,620	19,988	19,532	18,680	19,205
GREECE	2,527	2,593	2,535	2,500	2,550	2,511
IRELAND	847	847	847	847	807	807
ITALY	12,306	12,317	12,475	12,409	12,400	12,400
NETHERLANDS	3,302	3,299	3,246	3,318	3,300	3,300
PORTUGAL	1,515	1,580	1,613	1,767	1,804	1,860
SPAIN	10,586	10,977	10,307	8,869	9,178	9,193
UNITED KINGDOM	10,961	11,453	11,730	11,300	11,284	11,328
SUBTOTAL	83,005	82,376	82,089	79,994	79,396	80,014
OTHER WESTERN EUROPE						
AUSTRIA	1,674	1,649	1,645	1,646	1,652	1,650
FINLAND	881	832	800	824	818	818
SUBTOTAL	2,555	2,481	2,445	2,470	2,470	2,468
EASTERN EUROPE						
ROMANIA	7,459	6,956	6,277	6,535	5,910	6,025
POLAND	5,620	5,490	5,520	7,245	6,695	6,800
SUBTOTAL	13,079	12,446	11,797	13,780	12,605	12,825
FSU-12	74,212	71,266	68,785	60,073	57,319	56,000
BALTIC STATES	2,201	2,046	2,068	1,739	1,550	1,500
SUBTOTAL	76,413	73,312	70,853	61,812	58,869	57,500
MIDDLE EAST						
ISRAEL	1,520	1,551	1,590	1,853	1,902	1,953
SAUDI ARABIA	2,400	2,470	2,525	2,590	2,590	2,500
TURKEY	5,637	6,570	7,300	7,300	7,540	7,590
SUBTOTAL	9,557	10,591	11,415	11,743	12,032	12,043
AFRICA						
EGYPT	3,000	2,800	2,645	2,700	2,750	2,750
SUBTOTAL	3,000	2,800	2,645	2,700	2,750	2,750
ASIA						
CHINA (PRC)	137,100	154,180	173,377	191,203	201,660	211,260
HONG KONG	1,364	1,401	1,466	1,393	1,515	1,508
JAPAN	30,000	29,100	29,800	34,380	34,597	34,352
KOREA, REPUBLIC OF	6,701	6,810	7,370	7,350	7,780	8,375
TAIWAN	3,834	3,840	3,845	4,452	4,771	4,750
SUBTOTAL	178,999	195,331	215,858	238,778	250,323	260,245
OCEANIA						
AUSTRALIA	2,794	3,017	3,097	3,230	3,290	3,200
SUBTOTAL	2,794	3,017	3,097	3,230	3,290	3,200
TOTAL	455,327	467,211	487,671	501,374	507,945	518,261

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG EXPORTS

SELECTED COUNTRIES
(MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	261	274	267	378	305	302
MEXICO	0	0	0	0	0	0
UNITED STATES	1,099	1,206	1,852	1,884	1,848	1,884
SUBTOTAL	1,360	1,480	2,119	2,262	2,153	2,186
SOUTH AMERICA						
BRAZIL	2	4	20	22	10	20
VENEZUELA	0	0	0	6	4	6
SUBTOTAL	2	4	20	28	14	26
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	1,712	1,687	1,714	1,843	1,862	1,870
DENMARK	143	197	178	170	172	172
FRANCE	571	893	1,048	1,200	1,200	1,150
GERMANY	1,537	1,880	1,300	1,100	1,490	1,415
GREECE	0	6	20	30	25	25
IRELAND	3	3	3	3	3	3
ITALY	50	56	29	51	40	40
NETHERLANDS	7,980	8,248	8,373	7,869	7,300	7,500
PORTUGAL	22	22	66	53	43	8
SPAIN	25	53	112	49	53	63
UNITED KINGDOM	410	620	243	245	251	251
SUBTOTAL	12,453	13,665	13,086	12,613	12,439	12,497
INTRA EC-TRADE	10,416	11,483	10,832	9,758	9,770	10,204
OTHER WESTERN EUROPE						
FINLAND	326	329	208	191	230	230
SUBTOTAL	326	329	208	191	230	230
FSU-12	0	20	20	10	5	1
SUBTOTAL	0	20	20	10	5	1
EASTERN EUROPE						
HUNGARY	125	100	95	95	90	80
POLAND	15	107	10	10	20	10
ROMANIA	535	0	0	0	0	0
SUBTOTAL	675	207	105	105	110	90
MIDDLE EAST						
ISRAEL	145	46	50	49	51	51
SAUDI ARABIA	166	203	173	213	221	228
TURKEY	1,214	47	16	16	7	15
SUBTOTAL	1,525	296	239	278	279	294
AFRICA						
SO. AFRICA, REP OF	34	90	111	92	86	80
SUBTOTAL	34	9	111	92	86	80
ASIA						
CHINA (PRC)	814	786	788	965	900	900
HONG KONG	55	45	35	36	40	43
JAPAN	4	2	2	0	0	0
TAIWAN	26	0	0	9	9	10
SUBTOTAL	933	923	936	1,102	1,035	1,033
OCEANIA						
AUSTRALIA	100	38	38	41	41	44
SUBTOTAL	100	38	38	41	41	44
TOTAL	17,408	16,971	16,882	16,722	16,392	16,481
TOTAL (EXCL INTRA-EC TRADE)	6,992	5,488	6,050	6,964	6,622	6,277

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG IMPORTS

SELECTED COUNTRIES
(MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	409	430	404	407	405	390
MEXICO	164	136	90	110	110	92
UNITED STATES	302	109	28	52	60	54
SUBTOTAL	875	566	494	517	515	482
SOUTH AMERICA						
ARGENTINA	5	5	25	30	16	15
VENEZUELA	3	0	46	38	41	41
SUBTOTAL	8	5	71	68	57	56
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	1,153	1,083	1,026	1,115	1,124	1,124
DENMARK	108	152	155	194	170	170
FRANCE	1,327	1,253	1,238	1,320	1,330	1,300
GERMANY	5,358	5,700	5,763	5,467	5,470	5,820
GREECE	20	33	41	35	35	36
IRELAND	210	210	210	210	210	210
ITALY	1,133	919	936	1,006	970	970
NETHERLANDS	622	746	857	798	850	800
PORTUGAL	17	12	8	6	7	8
SPAIN	471	371	235	243	246	256
UNITED KINGDOM	824	1,415	967	846	855	859
SUBTOTAL	11,243	11,894	11,436	11,240	11,267	11,553
INTRA EC-TRADE	10,416	11,483	10,832	9,758	9,770	10,204
OTHER WESTERN EUROPE						
AUSTRIA	350	413	413	296	303	308
SUBTOTAL	350	413	413	296	303	308
FSU-12	199	200	120	78	70	70
SUBTOTAL	199	200	120	78	70	70
EASTERN EUROPE						
POLAND	0	60	514	965	515	515
SUBTOTAL	0	60	514	965	515	515
MIDDLE EAST						
SAUDI ARABIA	29	29	66	36	31	30
TURKEY	1	5	11	30	30	30
SUBTOTAL	30	34	77	66	61	60
AFRICA						
EGYPT	20	0	0	0	0	0
SUBTOTAL	20	0	0	0	0	0
ASIA						
CHINA (PRC)	23	53	50	88	60	60
HONG KONG	1,605	1,631	1,690	1,633	1,750	1,760
JAPAN	751	769	1,093	771	772	802
SUBTOTAL	2,379	2,453	2,833	2,492	2,582	2,622
TOTAL	15,104	15,625	15,958	15,722	15,370	15,666
TOTAL (EXCL INTRA-EC TRADE)	4,688	4,142	5,126	5,964	5,600	5,462

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGGS: TOTAL UTILIZATION

SELECTED COUNTRIES
(MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	5,848	5,826	5,805	5,646	5,649	5,665
MEXICO	18,113	18,175	19,929	19,759	20,231	20,542
UNITED STATES	66,435	66,878	67,512	68,753	69,436	70,050
SUBTOTAL	90,396	90,879	93,246	94,158	95,316	96,257
SOUTH AMERICA						
ARGENTINA	3,355	3,437	4,050	3,417	2,805	2,805
BRAZIL	12,174	13,450	13,635	13,635	14,178	14,725
VENEZUELA	2,606	1,147	1,974	2,385	2,289	2,355
SUBTOTAL	18,135	18,034	19,659	19,437	19,272	19,885
EUROPEAN COMMUNITY						
BELGIUM-LUXEMBOUR	2,165	2,337	2,446	2,468	2,465	2,462
DENMARK	1,260	1,135	1,161	1,163	1,150	1,150
FRANCE	15,687	14,959	15,415	15,415	15,500	15,500
GERMANY	21,510	21,020	20,114	19,532	18,680	19,205
GREECE	2,515	2,490	2,550	2,515	2,515	2,505
IRELAND	841	841	841	841	841	841
ITALY	10,356	10,337	10,455	10,389	10,380	10,380
NETHERLANDS	3,302	3,299	3,246	3,318	3,300	3,300
PORTUGAL	1,510	1,576	1,608	1,725	1,816	1,869
SPAIN	10,586	10,977	10,307	8,869	9,178	9,193
UNITED KINGDOM	10,689	11,247	10,299	9,652	9,631	9,649
SUBTOTAL	80,421	80,218	78,442	75,887	75,456	76,054
OTHER WESTERN EUROPE						
AUSTRIA	1,751	1,728	1,726	1,732	1,743	1,744
FINLAND	891	846	812	836	830	830
SUBTOTAL	2,642	2,574	2,538	2,568	2,573	2,574
EASTERN EUROPE						
HUNGARY	4,125	4,200	4,190	4,190	4,000	4,000
POLAND	7,930	7,352	6,697	6,945	6,345	6,455
ROMANIA	7,035	7,100	6,970	7,050	6,750	5,450
SUBTOTAL	19,090	18,652	17,857	18,185	17,095	15,905
FSU-12	82,212	79,266	76,785	68,073	65,319	65,000
BALTIC STATES	2,821	2,639	2,068	1,739	1,550	1,500
SUBTOTAL	85,033	81,905	78,853	69,812	66,869	66,500
MIDDLE EAST						
ISRAEL	1,751	1,806	1,837	1,853	1,902	1,953
SAUDI ARABIA	2,652	2,750	2,805	2,900	2,973	2,900
TURKEY	6,037	7,058	7,845	7,821	8,120	8,170
SUBTOTAL	10,440	11,614	12,487	12,574	12,995	13,023
AFRICA						
EGYPT	3,000	3,177	2,980	3,030	3,080	3,000
SUBTOTAL	3,000	3,177	2,980	3,030	3,080	3,000
ASIA						
CHINA (PRC)	140,109	158,187	184,262	203,103	214,160	224,160
HONG KONG	1,385	1,420	1,488	1,406	1,529	1,522
JAPAN	31,460	30,465	31,260	36,490	36,702	36,452
KOREA, REPUBLIC OF	6,921	7,140	7,770	7,756	8,205	8,805
TAIWAN	4,054	3,840	3,845	4,452	4,771	4,750
SUBTOTAL	183,929	201,052	228,625	253,207	265,367	275,689
OCEANIA						
AUSTRALIA	3,186	3,430	3,527	3,673	3,742	3,700
SUBTOTAL	3,186	3,430	3,527	3,673	3,742	3,700
TOTAL	496,272	511,535	538,214	552,531	561,765	572,587

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TOTAL POULTRY MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	26.90	27.72	27.82	27.93	28.56	28.84
MEXICO	8.10	8.39	10.24	11.92	12.90	13.20
UNITED STATES	35.02	36.51	37.83	39.19	40.32	41.50
SOUTH AMERICA						
ARGENTINA	13.60	10.29	13.43	19.15	19.07	20.21
BRAZIL	12.90	13.84	15.22	16.07	17.33	18.77
VENEZUELA	13.50	10.31	14.37	15.04	14.91	15.66
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	15.70	15.27	15.32	15.95	15.90	15.87
DENMARK	11.70	11.67	13.20	15.10	11.29	12.03
FRANCE	21.20	21.53	22.17	23.30	24.57	24.20
GERMANY	11.10	11.15	11.32	12.99	13.25	13.38
GREECE	15.70	16.74	17.02	18.38	17.76	17.74
IRELAND	17.80	24.23	24.47	24.42	25.21	26.00
ITALY	18.30	18.78	18.50	18.62	18.67	18.65
NETHERLANDS	15.70	17.13	19.63	20.12	22.38	22.72
PORTUGAL	20.40	20.65	22.76	22.11	22.79	22.81
SPAIN	23.00	23.23	24.11	24.06	24.10	24.17
UNITED KINGDOM	19.30	23.95	24.46	27.37	27.54	27.92
OTHER WESTERN EUROPE						
AUSTRIA	12.10	12.05	12.54	13.09	13.39	13.70
FINLAND	6.30	6.63	7.21	7.39	7.18	7.16
EASTERN EUROPE						
POLAND	8.90	6.17	6.27	6.25	5.84	5.95
FSU-12	11.96	11.96	10.89	9.41	8.81	8.46
MIDDLE EAST						
ISRAEL	33.70	36.95	38.56	41.07	41.07	41.18
SAUDI ARABIA	27.10	27.35	31.26	32.02	32.02	32.26
TURKEY	4.60	7.79	8.84	9.15	9.26	9.44
AFRICA						
EGYPT	5.40	4.40	4.12	4.97	5.03	5.09
SO. AFRICA, REP OF	14.60	14.37	13.92	18.30	17.29	17.07
ASIA						
CHINA (PRC)	2.60	2.81	3.40	3.81	4.22	4.56
HONG KONG	32.60	33.52	36.56	44.66	45.25	44.51
JAPAN	14.40	13.67	13.61	14.08	14.05	14.04
SINGAPORE	36.30	100.74	105.93	133.59	139.07	143.41
TAIWAN	22.80	13.85	14.13	14.70	15.69	16.43
THAILAND	8.20	1.68	1.78	1.75	1.73	1.63
OCEANIA						
AUSTRALIA	24.60	24.43	24.42	25.66	25.97	26.39

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA BROILER MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	22.30	23.03	23.15	23.22	23.83	24.09
MEXICO	7.50	7.86	9.35	10.92	11.69	11.95
UNITED STATES	26.63	27.67	28.89	30.30	31.34	32.52
SOUTH AMERICA						
ARGENTINA	12.60	9.36	12.97	18.54	19.16	19.61
BRAZIL	12.50	13.48	14.84	15.76	17.02	18.43
VENEZUELA	13.50	10.26	14.37	15.24	15.38	15.98
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	13.10	12.18	12.24	11.53	11.59	11.47
DENMARK	9.40	9.53	9.70	11.43	11.87	12.41
FRANCE	11.10	11.44	11.21	13.07	14.32	14.00
GERMANY	6.70	6.86	7.08	6.92	7.49	7.28
GREECE	13.80	13.55	13.53	15.30	14.88	14.96
IRELAND	12.70	12.83	13.37	13.35	13.88	14.13
ITALY	11.00	11.27	11.00	11.16	11.15	11.13
NETHERLANDS	12.30	13.19	13.44	13.83	14.28	14.73
PORTUGAL	17.60	17.75	18.92	19.33	19.65	19.76
SPAIN	21.10	20.87	21.80	21.73	21.86	21.80
UNITED KINGDOM	14.50	14.91	17.18	17.41	18.08	18.27
OTHER WESTERN EUROPE						
AUSTRIA	8.20	8.03	8.06	8.39	8.59	8.67
FINLAND	5.50	5.63	6.21	6.59	6.58	6.76
EASTERN EUROPE						
HUNGARY	20.60	20.26	18.36	14.23	14.53	15.31
POLAND	5.64	4.70	4.76	4.95	4.83	5.12
FSU-12	6.67	6.75	6.27	4.63	4.27	4.06
MIDDLE EAST						
ISRAEL	24.30	25.56	25.56	28.22	28.26	28.31
SAUDI ARABIA	26.90	27.16	29.08	31.32	31.45	31.65
TURKEY	3.20	4.53	4.69	5.28	5.34	5.31
AFRICA						
EGYPT	4.10	3.48	3.09	3.99	4.16	4.07
SO. AFRICA, REP OF	12.50	12.54	12.51	15.52	14.65	14.50
ASIA						
CHINA (PRC)	1.49	1.54	1.51	1.68	1.88	2.05
HONG KONG	26.20	26.99	29.38	35.66	36.14	35.27
JAPAN	13.20	126.25	12.60	13.10	13.02	13.02
SINGAPORE	32.10	29.78	33.01	31.88	31.49	31.83
TAIWAN	15.90	17.71	18.15	19.01	19.58	19.48
THAILAND	8.00	7.79	8.20	8.76	8.90	8.56
OCEANIA						
AUSTRALIA	22.20	21.97	21.99	23.10	23.34	23.73

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TURKEY MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	4.60	4.70	4.67	4.72	4.73	4.75
MEXICO	0.20	0.17	0.45	0.63	0.72	0.75
UNITED STATES	7.53	7.98	8.16	8.16	8.21	8.21
SOUTH AMERICA						
BRAZIL	0.30	0.36	0.37	0.30	0.34	0.34
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	1.80	1.84	2.12	2.50	2.59	2.68
DENMARK	0.80	1.17	1.36	1.74	2.11	2.29
FRANCE	5.40	5.55	6.00	5.92	6.25	6.22
GERMANY	2.20	2.62	3.00	3.38	3.54	3.58
GREECE	0.40	0.40	0.50	0.40	0.60	0.50
IRELAND	4.00	3.99	3.98	3.98	3.97	3.96
ITALY	4.50	4.72	4.58	4.63	4.69	4.70
NETHERLANDS	1.40	1.81	1.93	2.18	2.37	2.36
PORTUGAL	2.80	2.89	3.36	2.87	3.15	3.33
SPAIN	0.80	1.13	1.02	0.74	0.79	0.79
UNITED KINGDOM	3.60	3.67	4.10	3.94	3.99	4.08
EASTERN EUROPE						
POLAND	0.40	0.00	0.00	0.39	0.34	0.41
MIDDLE EAST						
ISRAEL	10.30	0.00	0.00	9.27	8.94	9.11

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TABLE EGG CONSUMPTION

SELECTED COUNTRIES
(IN PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	171	162	159	156	152	150
MEXICO	193	184	197	193	187	188
UNITED STATES	194	186	183	181	179	177
SOUTH AMERICA						
ARGENTINA	97	96	115	86	66	64
BRAZIL	83	88	88	86	88	90
VENEZUELA	124	52	91	107	99	100
EUROPEAN COMMUNITY						
BELGIUM-LUXEM.	195	226	236	237	236	235
DENMARK	220	265	274	284	248	248
FRANCE	262	264	272	271	271	271
GERMANY	253	260	250	243	231	237
GREECE	240	258	252	248	253	249
IRELAND	226	241	241	241	229	228
ITALY	169	214	216	214	214	213
NETHERLANDS	183	221	216	220	217	216
PORTUGAL	129	152	155	169	172	177
SPAIN	248	282	264	227	234	234
UNITED KINGDOM	173	199	204	196	194	194
OTHER WESTERN EUROPE						
AUSTRIA	220	214	211	209	209	207
FINLAND	178	167	160	165	163	163
EASTERN EUROPE						
POLAND	198	144	144	189	174	176
FSU-12	257	245	235	204	193	187
MIDDLE EAST						
ISRAEL	356	360	350	390	387	387
SAUDI ARABIA	154	152	153	152	147	137
TURKEY	104	115	125	122	124	122
AFRICA						
EGYPT	58	52	48	48	48	47
ASIA						
CHINA (PRC)	126	136	151	163	170	175
HONG KONG	242	241	250	237	256	253
JAPAN	245	235	240	276	277	274
OCEANIA						
AUSTRALIA	170	170	170	170	170	170

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

FORMER SOVIET UNION POULTRY PRODUCTION, SUPPLY, AND DISTRIBUTION TABLES FOR TOTAL POULTRY, BROILERS, AND TABLE EGGS.

Poultry products production and distribution data for the Baltic States and Republics of the former Soviet Union (FSU) are presented in the following tables. The information is preliminary and represents FAS's best assessment of the poultry situation in the FSU. As new information becomes available the data will be updated. Note that due to considerable gaps in the raw data, particularly with respect to external and internal trade shipments, *this information should not be regarded as U.S.D.A. official data.* U.S.D.A. welcomes any comments, suggestions, or other information could improve the accuracy of the data in these tables.

FSU TOTAL POULTRY PS&D

ARMENIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	32	34	25	20	13	12
Sub-total	32	34	25	20	13	12
Consumption	42	43	30	22	14	13
Balance	-10	-9	-5	-2	-1	-1
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	10	8	4	1	0	0
Non-Intra FSU Imports	0	1	1	1	1	1
Total	10	9	5	2	1	1
Ending Stocks	0	0	0	0	0	0

AZERBAIJAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	58	54	48	40	35	30
Sub-total	58	54	48	40	35	30
Consumption	91	82	75	65	53	50
Balance	-33	-28	-27	-25	-18	-20
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	32	27	26	24	17	19
Non-Intra FSU Imports	1	1	1	1	1	1
Total	33	28	27	25	18	20
Ending Stocks	0	0	0	0	0	0

BELARUS	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	142	142	135	125	120	115
Sub-total	142	142	135	125	120	115
Consumption	92	97	92	88	82	80
Balance	50	45	43	37	38	35
Intra-Exports	50	45	43	37	38	35
Non-Intra FSU Exports	0	0	0	0	0	0
Total	50	45	43	37	38	35
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU TOTAL POULTRY PS&D

GEORGIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	37	38	26	24	23	20
Sub-total	37	38	26	24	23	20
Consumption	57	48	31	32	30	26
Balance	-20	-10	-5	-8	-7	-6
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	20	10	5	8	7	6
Non-Intra FSU Imports	0	0	0	0	0	0
Total	20	10	5	8	7	6
Ending Stocks	0	0	0	0	0	0

KAZAKHSTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	210	202	200	180	160	160
Sub-total	210	202	200	180	160	160
Consumption	165	167	160	146	127	130
Balance	45	35	40	34	33	30
Intra-Exports	45	35	40	34	33	30
Non-Intra FSU Exports	0	0	0	0	0	0
Total	45	35	40	34	33	30
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

KYRGYZSTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	32	33	33	30	27	25
Sub-total	32	33	33	30	27	25
Consumption	31	32	32	28	24	22
Balance	1	1	1	2	3	3
Intra-Exports	1	1	1	2	3	3
Non-Intra FSU Exports	0	0	0	0	0	0
Total	1	1	1	2	3	3
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU TOTAL POULTRY PS&D

MOLDAVA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	66	66	53	45	40	38
Sub-total	66	66	53	45	40	38
Consumption	46	56	48	41	35	33
Balance	20	10	5	4	5	5
Intra-Exports	20	10	5	4	5	5
Non-Intra FSU Exports	0	0	0	0	0	0
Total	20	10	5	4	5	5
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

RUSSIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	1831	1801	1751	1577	1490	1450
Sub-total	1831	1801	1751	1577	1490	1450
Consumption	2194	2194	2042	1730	1657	1619
Balance	-363	-393	-291	-153	-167	-169
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	171	179	176	124	114	109
Non-Intra FSU Imports	192	214	115	29	53	60
Total	363	393	291	153	167	169
Ending Stocks	0	0	0	0	0	0

TAJIKISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	15	15	8	8	8	7
Sub-total	15	15	8	8	8	7
Consumption	21	20	12	13	12	11
Balance	-6	-5	-4	-5	-4	-4
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	3	2	2	2	2	1
Non-Intra FSU Imports	3	3	2	3	2	3
Total	6	5	4	5	4	4
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU TOTAL POULTRY PS&D

TURKMENISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	9	9	8	7	6	6
Sub-total	9	9	8	7	6	6
Consumption	13	15	12	12	10	10
Balance	-4	-6	-4	-5	-4	-4
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	2	3	2	3	2	2
Non-Intra FSU Imports	2	3	2	2	2	2
Total	4	6	4	5	4	4
Ending Stocks	0	0	0	0	0	0

UKRAINE	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	731	708	671	600	550	525
Sub-total	731	708	671	600	550	525
Consumption	635	629	573	531	515	485
Balance	96	79	98	69	35	40
Intra-Exports	96	79	98	69	35	40
Non-Intra FSU Exports	0	0	0	0	0	0
Total	96	79	98	69	35	40
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

UZBEKISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	70	67	65	50	45	40
Sub-total	70	67	65	50	45	40
Consumption	97	97	85	69	60	52
Balance	-27	-30	-20	-19	-15	-12
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	15	8	11	10	9	8
Non-Intra FSU Imports	12	22	9	9	6	4
Total	27	30	20	19	15	12
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU TOTAL POULTRY PS&D

ESTONIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	25	22	22	20	19	18
Sub-total	25	22	22	20	19	18
Consumption	16	15	14	14	13	13
Balance	9	7	8	6	6	5
Intra-Exports	9	7	8	6	6	5
Non-Intra FSU Exports	0	0	0	0	0	0
Total	9	7	8	6	6	5
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

LATVIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	43	40	39	36	34	32
Sub-total	43	40	39	36	34	32
Consumption	32	33	30	29	29	27
Balance	11	7	9	7	5	5
Intra-Exports	11	7	9	7	5	5
Non-Intra FSU Exports	0	0	0	0	0	0
Total	11	7	9	7	5	5
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

LITHUANIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	57	56	54	45	43	40
Sub-total	57	56	54	45	43	40
Consumption	36	36	34	30	30	25
Balance	21	20	22	18	26	22
Intra-Exports	21	20	22	18	26	22
Non-Intra FSU Exports	0	0	0	0	0	0
Total	21	20	22	18	26	22
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU TOTAL POULTRY PS&D

Total FSU	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	3358	3287	3138	2807	2613	2518
Sub-total	3358	3287	3138	2807	2613	2518
Consumption	3568	3564	3270	2850	2691	2596
Balance	-210	-277	-130	-40	-65	-71
Intra-Exports	253	204	226	177	151	145
Non-Intra FSU Exports	0	0	0	0	0	0
Total	253	204	226	177	151	145
Intra-Imports	253	237	226	172	151	145
Non-Intra FSU Imports	210	244	130	45	65	71
Total	463	481	356	217	216	216
Ending Stocks	0	0	0	0	0	0

OURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU BROILER PS&D

ARMENIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	17	19	14	10	6	6
Sub-total	17	19	14	10	6	6
Consumption	23	24	18	12	7	7
Balance	-6	-5	-4	-2	-1	-1
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	6	4	3	1	0	0
Non-Intra FSU Imports	0	1	1	1	1	1
Total	6	5	4	2	1	1
Ending Stocks	0	0	0	0	0	0

AZERBAIJAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	31	30	27	19	15	14
Sub-total	31	30	27	19	15	14
Consumption	46	45	42	39	29	30
Balance	-15	-15	-15	-20	-14	-16
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	14	14	14	19	13	15
Non-Intra FSU Imports	1	1	1	1	1	1
Total	15	15	15	20	14	16
Ending Stocks	0	0	0	0	0	0

BELARUS	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	77	78	75	60	55	55
Sub-total	77	78	75	60	55	55
Consumption	37	42	41	30	25	27
Balance	40	36	34	30	30	28
Intra-Exports	40	36	34	30	30	28
Non-Intra FSU Exports	0	0	0	0	0	0
Total	40	36	34	30	30	28
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU BROILER PS&D

GEORGIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	20	21	14	12	10	10
Sub-total	20	21	14	12	10	10
Consumption	28	26	18	18	16	15
Balance	-8	-5	-4	-6	-6	-5
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	8	5	4	6	6	5
Non-Intra FSU Imports	0	0	0	0	0	0
Total	8	5	4	6	6	5
Ending Stocks	0	0	0	0	0	0

KAZAKHSTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	114	111	111	86	75	75
Sub-total	114	111	111	86	75	75
Consumption	78	83	79	59	49	51
Balance	36	28	32	27	26	24
Intra-Exports	36	28	32	27	26	24
Non-Intra FSU Exports	0	0	0	0	0	0
Total	36	28	32	27	26	24
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

KYRGYZSTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	17	18	18	14	12	11
Sub-total	17	18	18	14	12	11
Consumption	16	17	17	12	10	9
Balance	1	1	1	2	2	2
Intra-Exports	1	1	1	2	2	2
Non-Intra FSU Exports	0	0	0	0	0	0
Total	1	1	1	2	2	2
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU BROILER PS&D

MOLDAVA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	36	36	30	22	20	18
Sub-total	36	36	30	22	20	18
Consumption	20	28	26	19	16	14
Balance	16	8	4	3	4	4
Intra-Exports	16	8	4	3	4	4
Non-Intra FSU Exports	0	0	0	0	0	0
Total	16	8	4	3	4	4
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

RUSSIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	991	984	978	757	709	685
Sub-total	991	984	978	757	709	685
Consumption	1289	1255	1190	870	848	811
Balance	-298	-271	-212	-113	-139	-126
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	115	96	105	86	90	85
Non-Intra FSU Imports	183	175	107	27	49	41
Total	298	271	212	113	139	126
Ending Stocks	0	0	0	0	0	0

TAJIKISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	8	8	4	4	4	3
Sub-total	8	8	4	4	4	3
Consumption	10	11	7	7	7	6
Balance	-2	-3	-3	-3	-3	-3
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	-1	1	1	1	1	1
Non-Intra FSU Imports	3	2	2	2	2	2
Total	2	3	3	3	3	3
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU BROILER PS&D

TURKMENISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	5	5	4	4	4	3
Sub-total	5	5	4	4	4	3
Consumption	7	10	7	7	7	6
Balance	-2	-5	-3	-3	-3	-3
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	2	1	1	1	1
Non-Intra FSU Imports	2	3	2	2	2	2
Total	2	5	3	3	3	3
Ending Stocks	0	0	0	0	0	0

UKRAINE	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	396	388	374	288	260	250
Sub-total	396	388	374	288	260	250
Consumption	376	361	339	253	222	210
Balance	20	27	35	35	38	40
Intra-Exports	20	27	35	35	38	40
Non-Intra FSU Exports	0	0	0	0	0	0
Total	20	27	35	35	38	40
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

UZBEKISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	38	37	36	24	20	20
Sub-total	38	37	36	24	20	20
Consumption	53	61	52	39	32	30
Balance	-15	-24	-16	-15	-12	-10
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	5	6	9	8	7	7
Non-Intra FSU Imports	10	18	7	7	5	3
Total	15	24	16	15	12	10
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU BROILER PS&D

ESTONIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	14	12	12	10	9	8
Sub-total	14	12	12	10	9	8
Consumption	6	6	6	5	5	5
Balance	8	6	6	5	4	3
Intra-Exports	8	6	6	5	4	3
Non-Intra FSU Exports	0	0	0	0	0	0
Total	8	6	6	5	4	3
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

LATVIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	24	22	22	18	16	15
Sub-total	24	22	22	18	16	15
Consumption	15	16	15	12	13	12
Balance	9	6	7	6	3	3
Intra-Exports	9	6	7	6	3	3
Non-Intra FSU Exports	0	0	0	0	0	0
Total	9	6	7	6	3	3
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

LITHUANIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	32	31	31	22	20	19
Sub-total	32	31	31	22	20	19
Consumption	15	15	13	8	9	9
Balance	17	16	18	14	11	10
Intra-Exports	17	16	18	14	11	10
Non-Intra FSU Exports	0	0	0	0	0	0
Total	17	16	18	14	11	10
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU BROILER PS&D

Total FSU	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	1820	1800	1750	1350	1235	1192
Sub-total	1820	1800	1750	1350	1235	1192
Consumption	2019	2000	1870	1390	1295	1242
Balance	-199	-200	-120	-40	-60	-50
Intra-Exports	147	128	137	122	118	114
Non-Intra FSU Exports	0	0	0	0	0	0
Total	147	128	137	122	118	114
Intra-Imports	147	128	137	122	118	114
Non-Intra FSU Imports	199	200	120	40	60	50
Total	346	328	257	162	178	164
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU EGGS PS&D

ARMENIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	561	518	485	244	200	175
Sub-total	561	518	485	244	200	175
Consumption	561	518	485	244	200	175
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

AZERBAIJAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	1056	985	958	780	700	600
Sub-total	1056	985	958	780	700	600
Consumption	1056	985	958	780	700	600
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

BELARUS	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	3651	3657	3718	3417	3300	3300
Sub-total	3651	3657	3718	3417	3300	3300
Consumption	3651	3657	3718	3417	3300	3300
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU EGGS PS&D

GEORGIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	861	769	946	700	700	720
Sub-total	861	769	946	700	700	720
Consumption	861	769	946	700	700	720
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

KAZAKHSTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	4253	4185	4025	3547	3300	3200
Sub-total	4253	4185	4025	3547	3300	3200
Consumption	4253	4185	4025	3547	3300	3200
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

KYRGYZSTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	704	714	650	593	550	500
Sub-total	704	714	650	593	550	500
Consumption	704	714	650	593	550	500
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

OURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU EGGS PS&D

MOLDAVA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	1154	1129	1061	801	600	550
Sub-total	1154	1129	1061	801	600	550
Consumption	1154	1129	1061	801	600	550
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

RUSSIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	49042	47470	47132	42552	39000	39000
Sub-total	49042	47470	47132	42552	39000	39000
Consumption	49241	47670	47252	42630	39070	39070
Balance	-199	-200	-120	-78	-70	-70
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	199	200	120	78	70	70
Total	199	200	120	78	70	70
Ending Stocks	0	0	0	0	0	0

TAJIKISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	619	592	455	316	250	220
Sub-total	619	592	455	316	250	220
Consumption	619	592	455	316	250	220
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU EGGS PS&D

TURKMENISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	328	327	300	310	300	310
Sub-total	328	327	300	310	300	310
Consumption	328	327	300	310	300	310
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

UKRAINE	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	17393	16287	15188	13445	12000	11500
Sub-total	17393	16287	15188	13445	12000	11500
Consumption	17393	16287	15188	13445	12000	11500
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

UZBEKISTAN	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	2429	2453	2347	1525	1400	1300
Sub-total	2429	2453	2347	1525	1400	1300
Consumption	2429	2453	2347	1525	1400	1300
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

URCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU EGGS PS&D

ESTONIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	600	547	531	480	450	450
Sub-total	600	547	531	480	450	450
Consumption	600	547	531	480	450	450
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

LATVIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	890	819	794	609	550	550
Sub-total	890	819	794	609	550	550
Consumption	890	819	794	609	550	550
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

LITHUANIA	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	1331	1273	1235	951	900	900
Sub-total	1331	1273	1235	951	900	900
Consumption	1331	1273	1235	951	900	900
Balance	0	0	0	0	0	0
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

FSU EGGS PS&D

Total FSU	1989	1990	1991	1992	PRELIM 1993	FORECAST 1994
Beginning Stocks	0	0	0	0	0	0
Production	84872	81725	79825	70270	64200	63275
Sub-total	84872	81725	79825	70270	64200	63275
Consumption	85071	81925	79945	70348	64270	63345
Balance	-199	-200	-120	-78	-70	-70
Intra-Exports	0	0	0	0	0	0
Non-Intra FSU Exports	0	0	0	0	0	0
Total	0	0	0	0	0	0
Intra-Imports	0	0	0	0	0	0
Non-Intra FSU Imports	199	200	120	78	70	70
Total	199	200	120	78	70	70
Ending Stocks	0	0	0	0	0	0

SOURCE: USDA/FAS/CMP/DAIRY, LIVESTOCK AND POULTRY DIVISION

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